



AVOID PROCESSING DELAYS

We make important changes to our forms at times. Check you're using the latest version by comparing the issue date at the bottom of this page with the version at unisuper.com.au/forms.



YOUR CHECKLIST

- Apply through the ATO:** You need to apply and be approved by the ATO before completing this form—log in to your myGov account to apply online, or contact the ATO.
- Complete and return this form to us:** Once the ATO confirms and approves your claim, complete this form and email or post it to us.
- Verify your ID:** We're required by law to verify your identity. You can log in to your account at unisuper.com.au to verify your identity online before returning your form via email—or you can include a certified copy of your ID with your posted form (read the attached *Your guide to proof of identity* fact sheet for more information).

Am I eligible to apply?

The ATO will assess your eligibility for release on compassionate grounds when you apply. To see the eligibility criteria, read the 'Accessing your super' section of our website at unisuper.com.au.



RETURNING YOUR FORM


Email or post your form (and certified ID if you're not verifying your identity online) to:

- enquiry@unisuper.com.au, or
- UniSuper
Level 1, 385 Bourke Street
Melbourne Vic 3000

Privacy statement

We recognise the importance of protecting your personal information and are committed to complying with our privacy law obligations. For more information on how we collect and manage your information, refer to the Privacy Statement at the end of this form.

SECTION 1 — Member details

 Please use **BLACK** or **BLUE BALLPOINT PEN** and print in **CAPITAL LETTERS**. Cross where required **X**. All fields in Section 1 are mandatory. Please ensure you complete all fields.

UniSuper member number

If you're unsure of your member number, refer to your most recent UniSuper correspondence or call us on **1800 331 685**.

Title Mr Mrs Ms Dr Professor

Other

Surname

Given name

Date of birth (DDMMYYYY)

If you've changed your personal details (i.e. residential address and email address) since you last contacted us, please update your details by:


- logging in to your account at unisuper.com.au
- completing the *Change of details form—super members* (available from unisuper.com.au), or
- calling us on **1800 331 685**.

What number can we call you on if we have a question about this form?

form continues →




SECTION 2 — Tax file number

 You don't have to provide your tax file number (TFN). However, if you don't provide it, you may pay more tax than you need to on your withdrawal.

 I've already provided my TFN to UniSuper.

 Provide my TFN:

— —


 I don't want to provide my TFN.



IMPORTANT INFORMATION

Read the important information about providing your TFN at [unisuper.com.au/tfn](https://www.unisuper.com.au/tfn). You can also request a copy of that information, free of charge, by calling **1800 331 685**.


SECTION 3 — What amount do you want to withdraw?


 You can apply to withdraw up to the amount approved by the ATO—you need to have applied and been accepted by the ATO before you can complete this section.

\$, . (Net of tax)

Note: If the amount you've nominated exceeds your account balance, we'll withdraw your entire balance and your account may close. If your account closes, or you have an insufficient balance to cover your insurance premiums, your insurance may cease. For more information, read the *Insurance in your super* booklet, available at [unisuper.com.au/factsheets](https://www.unisuper.com.au/factsheets).


SECTION 4 – Payment options

 Electronic funds transfer (EFT) sent to your nominated financial institution. Go to SECTION 5.

 Cheque sent to your mailing address on file. Go to SECTION 6.

Allow 10 working days for processing and payments made by cheque.

SECTION 5 — Financial institution details

 Provide your financial institution account details to which the benefit payment will be paid.

Financial institution name


Name in which the account is held. (Payments can only be made if the nominated financial institution account is in your name or a joint account in your name and can't be made to a third party.)

BSB number

Account number

Please ensure you've entered your financial institution account details correctly. UniSuper's responsibility is discharged once payment is made to this account.

SECTION 6 – Consent to have your identification verified by UniSuper

 I consent to my personal details being used to electronically verify my identity if paper copies of my certified documents are incorrectly certified or can't be read.

I understand my details will be verified through the Australian Government's Document Verification Service and subject to an information match request in relation to relevant official record holder information and a corresponding match result and associated data will be processed through third party systems.

SECTION 7 – Member declaration and signature



Please read this declaration before you sign and date your form.

- I declare that the information I have provided on this form is true and correct.
- I understand that if the amount I've nominated exceeds my account balance, UniSuper will withdraw my entire balance and my account may close. If my account closes, or I have an insufficient balance to cover my insurance premiums, my insurance may cease.
- I understand that if I don't provide my TFN I may be liable to pay additional tax on my benefit payment.
- I understand that if I don't provide the appropriately certified proof of identity documents my application cannot be processed.
- I authorise payment to be made as indicated in Section 5 (if applicable).
- I consent to my personal information being used in line with UniSuper's Privacy Policy.

Signature

Date (DDMMYYYY)



NEED HELP?

For more information:

→ email enquiry@unisuper.com.au, or

→ call **1800 331 685**.

When will my form be processed?

If you've provided a correctly completed form (and any certified ID or other paperwork, if required), we'll aim to process your request as soon as possible. Not providing correct information may delay us processing your request. Please allow 3 – 5 business days for your form to arrive. We'll contact you if we have any queries in relation to your request.

Privacy statement

We recognise the importance of protecting your personal information and are committed to complying with our privacy law obligations.

We collect your personal information to administer your account, ensure you're eligible for insurance cover, provide you with UniSuper membership benefits, services and products, verify your identity and improve our products and services. You consent to our collecting sensitive information about you, where collecting that information is reasonably necessary for us to perform one or more of our functions or activities. We usually collect personal and sensitive information directly from you, however, it may also be collected from third parties, such as your employer.

We may also collect this information from you because we're required or authorised by or under an Australian law or a court/tribunal order to collect that information.

If you don't provide this information, we may not be able to administer your account, provide you with a product or service or you may be disadvantaged in some other way.

We may disclose your information to any service provider we engage (for example mail-houses, auditors, insurers, actuaries, lawyers and research consultants) to carry out or help us provide your membership benefits, services and products. This includes overseas entities. The countries we may disclose personal information to are Japan, Canada and the United States of America. Where information is transferred overseas, we'll seek to ensure the recipient of the data has security systems to prevent misuse, loss or unauthorised disclosure in line with Australian laws and standards.

Our Privacy Policy contains information about how you can access any personal information we hold, how to correct your information and how to make a complaint about a breach of the Privacy Act. It's available at [unisuper.com.au](https://www.unisuper.com.au) or by calling us on **1800 331 685**.

Your guide to proof of identity



We take looking after your retirement savings very seriously—which is why you need to prove your identity (ID) before making withdrawals or other important changes to your account.

Verify your identity online

Proving your identity online is quick and easy—you'll know as soon as your identity gets verified. Log in at unisuper.com.au/memberonline to get started. Only Australian residents with Australian documents currently living in Australia can verify their identity through MemberOnline.

You'll need one or more of the following valid documents:

- Australian passport
- Australian visa
- Australian citizenship certificate
- Australian birth certificate
- Australian driver's licence
- Medicare card
- Centrelink card
- State and Federal electoral roll details.

Make sure you've updated your current personal details with relevant government agencies before you begin the process of verifying your identity online. We use online government and public databases to securely verify your identity.

Or send us certified copies of your ID

You can also send us certified copies of your ID. The following guide explains the types of documents we can accept and how to ensure they're correctly certified.

ALLOW US TO VERIFY YOUR IDENTITY

In some cases and on some of our forms, we can verify your identity on your behalf if the document(s) you provide haven't been certified correctly or can't be read. All you need to do is give us consent by ticking the box on the applicable form—and we'll try to verify your identity electronically using those documents. We'll let you know if the process wasn't successful.

Why provide your TFN?

Giving us your tax file number (TFN) means we can process rollover and transfer requests to another super fund without additional proof of identity. If your TFN can't be validated, or you want to transfer to a self-managed super fund or organise a benefit payment, you'll still need to give us certified copies of your ID.

Visit unisuper.com.au/memberonline to provide your TFN online.

STEP 1: COLLECT ACCEPTABLE DOCUMENTS

We'll accept either one document from List A or two documents from List B.

LIST A

A CERTIFIED COPY OF A:

- current driver licence
- current passport (Australian passports that haven't expired more than two years ago are also acceptable)

LIST B

A CERTIFIED COPY OF A:

- birth certificate or birth extract
- Australian citizenship certificate
- a pension card issued by Centrelink that entitles the person to financial benefits.

AND:

- Notice of Assessment from the Australian Taxation Office (less than 12 months old) containing your name and residential address
- letter from Centrelink regarding a government assistance payment
- rates notice from local council (less than 12 months old) containing your name and residential address
- electricity, gas or water bill dated within the past three months that contains your name and residential address.

STEP 2: CERTIFY YOUR DOCUMENTS

Take your original document(s) and a clear photocopy of both sides of the original document to an authorised person.

Your ID must be properly certified

The authorised person will need to:

1. sight the original document, and the copy, to ensure both documents are identical, and
2. write or stamp 'this is a true and correct copy of the original document I have sighted' or 'certified true copy', followed by their:
 - signature
 - printed name
 - qualification (e.g. Magistrate), and
 - date.

If you've changed your name or are signing on behalf of another member, prove the 'link' between you and the name change, or other person—use a certified copy of one of the following documents as well as your other certified ID.

PURPOSE	SUITABLE LINKING DOCUMENT
Change of name	→ Marriage certificate → Deed poll or change of name certificate from the Registry of Births, Deaths and Marriages
Signing on behalf of another member	→ Power of Attorney → Guardianship papers

When having your documents certified, remember:

- All pages must be certified.
- The copy of the document must be certified—not on a separate page attached to the document.
- Certified copies of your documents must have an original signature.
- Faxed or emailed copies won't be accepted.
- Documents not written in English must be accompanied by an English translation prepared by an accredited translator.
- Documents certified more than a year ago won't be accepted.

Who can certify your documents

Some of the people authorised to certify IDs include:

1. A person currently licensed or registered under a State or Territory law to practise in one of the following occupations:
 - Architect
 - Nurse
 - Chiropractor
 - Occupational therapist
 - Conveyancer
 - Optometrist
 - Dentist
 - Patent or Trade marks attorney
 - Financial adviser or financial planner
 - Pharmacist
 - Legal practitioner
 - Physiotherapist
 - Medical practitioner
 - Psychologist
 - Midwife
 - Veterinary surgeon.
2. One of the following persons:
 - Teacher employed full-time at a school or tertiary education institution

- Agent of the Australian Postal Corporation who is in charge of, or a permanent employee with two or more years of continuous service with, an office supplying postal services to the public
- Bank, building society, credit union or finance company officer with two or more years of continuous service
- Clerk, Master, Registrar or Deputy Registrar of a court
- Judge of a court or a Magistrate
- Justice of the Peace
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants, the Institute of Public Accountants or the Association of Taxation and Management Accountants, or a Fellow of the National Tax Accountants' Association
- Notary public, and
- Police officer.

Visit the [Attorney General's website](#) for a full list of who can certify documents.

Using foreign documents?

These must be translated by an accredited translator (if they're not in English) and you must have the translated copies correctly certified by a person listed in the 'Members residing overseas' section below.

Members residing overseas

If you live overseas, the following people are authorised to certify identification documents:

- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
- Employee of the Commonwealth or the Australian Trade Commission who is authorised and exercising his or her function in a country or place outside Australia.
- A person authorised as a notary public in a foreign country.

Your documents must be certified by a person with an Australian connection. We won't accept certifications by a someone licensed or registered to practise outside of Australia in an occupation listed above, or who holds a position in a foreign country—except for a foreign notary public.

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Returning your form

- Mail to UniSuper, Level 1, 385 Bourke Street, Melbourne VIC 3000
- Email to enquiry@unisuper.com.au

This information is of a general nature only and includes general advice. It has been prepared without taking into account your individual objectives, financial situation or needs. Before making any decision in relation to your UniSuper membership, you should consider your personal circumstances, the relevant product disclosure statement for your membership category and whether to consult a licensed financial adviser. This information is current as at November 2017 and is based on our understanding of legislation at that date. Information is subject to change. To the extent that this fact sheet contains information which is inconsistent with the UniSuper Trust Deed and Regulations (together the Trust Deed), the Trust Deed will prevail.

Issued by: UniSuper Management Pty Ltd ABN 91 006 961 799, AFSL No. 235907 on behalf of UniSuper Limited the trustee of UniSuper, Level 1, 385 Bourke Street, Melbourne Vic 3000.

Fund: UniSuper, ABN 91 385 943 850

Trustee: UniSuper Limited, ABN 54 006 027 121 AFSL 492806

Date: February 2019 UNIS000F80 0219

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