

Compassionate grounds application form



Before using this form

The ATO must approve the release of super on compassionate grounds.

You can apply with the ATO through your mygov account at www.my.gov.au or by calling them on 13 10 20.

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.

PRIVACY STATEMENT

UniSuper is committed to protecting your personal information and the confidentiality of your information in accordance with privacy law obligations. The information that you provide to UniSuper on this form is collected and used in accordance with our Privacy Policy which can be found online at unisuper.com.au/privacy. If you have any privacy related questions, please call **1800 331 685**.

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).

If you've provided a correctly completed form (and any certified ID or other paperwork, if required), we'll process your request as soon as possible.

Not providing correct information may delay us processing your request. Please allow 5 business days for your form to arrive. We'll contact you if we have any queries in relation to your request.

SECTION 1 MEMBER DETAILS

- ▶ Please complete in BLACK or BLUE BALL POINT PEN using CAPITAL letters. Cross (X) where required. 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 (DD/MM/YYYY)

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**.

Daytime contact number



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.

Read the important information about providing your TFN at 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.

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 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 (must have six digits)

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

<input type="text"/>	<input type="text"/>	<input type="text"/>
<i>DD</i>	<i>MM</i>	<i>YYYY</i>

Returning your form

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

Need help?

- Email enquiry@unisuper.com.au
- Call **1800 331 685**.