



Rest Pension withdrawal form

Please complete this form if you would like to apply for a lump sum withdrawal (commutation) or if you would like to roll your Rest Pension to another fund.

Please write in **BLOCK LETTERS** and use a **BLACK** or **BLUE** pen. This request will be invalid if unsigned and undated.

Once you've completed and signed this form, please mail to: **PO Box 350, Parramatta NSW 2124.**

Please note that account-based pension members (excluding transition to retirement pension members) can make partial withdrawals of between \$1,000 and \$10,000 by logging into MemberAccess at rest.com.au.

Closing an existing pension account commenced before 1 January 2015 can have an effect on the income deeming rules used to assess your eligibility for Centrelink and Department of Veterans' Affairs (DVA) income support payments. We recommend that you seek advice from Centrelink, DVA or your financial advisor before closing down an existing pension account.

Section 1: Personal details

Rest Pension member number

Date of birth (dd/mm/yyyy)

Gender

 (M/F)

Title

Surname

Given name(s)

Residential Address

Unit number

Street number

Street name

Suburb/Town

State

Postcode

Telephone (business hours)

Mobile

Email address

Section 2: Transition to Retirement members only

If you have a Transition to Retirement (TTR) Pension, you are unable to cash any preserved or restricted non-preserved benefits unless you have met a condition of release.

- you have reached preservation age and are genuinely retired (see the Rest Pension PDS for information about preservation age). Please provide a Commonwealth statutory declaration confirming that you have met this condition of release
- you are aged 60 or above and have left employment or are changing your employer
- you have reached age 65
- you are totally and permanently disabled or have a terminal illness
- you are a former temporary resident and have permanently departed Australia (excluding New Zealand citizens)
- you have approval from the Australian Taxation Office that your money should be released for compassionate reasons.

Note: Any payments will first be made from your unrestricted non-preserved benefit, followed by your restricted non-preserved and preserved components.



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Section 3: Term Allocated Pension members only

If you have a Term Allocated Pension (TAP), you may only make a withdrawal under certain circumstances.

Please select one of the following:

- you need to pay a surcharge liability from the Australian Taxation Office (please provide a copy of your surcharge notice)
- you need to meet a Family Law payment split (please provide a copy of your Family Law splitting order).

Please note if you tick one of the boxes above, this form does not need to be completed.

Section 4: Payment details

Note: Government regulations require that in some cases, before making a withdrawal payment, we must first make a pension payment equal to the accrued minimum annual pension amount. Therefore, if you have elected to have your pension paid quarterly, half-yearly or yearly, any difference between the current accrued minimum annual pension amount and any pension payments that have already been made, will be paid as a regular pension payment before we complete your withdrawal. Normal pension PAYG taxation rates will apply.

Please complete either option 1 or 2 only.

Option 1: I wish to have the following cash amount paid to me:

- my total account balance
- a partial amount of \$

This amount will be credited to your nominated bank account.

Please note that account-based pension members (excluding transition to retirement pension members) can make partial withdrawals of between \$1,000 and \$10,000 by logging into MemberAccess at rest.com.au.

Please complete the following if you would like your withdrawal payment to be paid to a different bank account from your nominated bank account for your regular pension payments.

Note: You will need to supply a copy of your bank account statement if you nominate a different bank account from your nominated bank account.

Name of Australian financial institution

Branch name

BSB number

 -

Account number

Account name

You can only nominate a bank account that is held in your name.

- Please tick this box if you would like the above account to be your nominated bank account for your pension and any future lump sum payments.

OR

Option 2: I wish to roll the following amount from my Rest Pension to my Rest accumulation account or another fund.

- My total account balance
- A partial amount of \$

Name of rollover fund



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Section 4: Payment details (continued)

Address of rollover fund

Street number

Street name

Suburb/Town

State

Postcode

Australian Business Number (ABN) of rollover fund

Unique Superannuation Identifier (USI)

Policy/Account number

Note: The minimum withdrawal amount is \$1,000. If your account balance is less than \$1,000, then your full account balance will be withdrawn and your account will be closed.

Any partial payments must be paid in proportion to your tax free and taxable components.

Section 5: Declaration and signature

You must sign and date this declaration before returning this form.

- I acknowledge that in certain circumstances, Rest will make a pension payment prior to making this withdrawal payment.
- The information I have supplied on this application is true and correct at the date of signing this application and I will notify Rest immediately if any of this information changes.
- I acknowledge that Rest has advised me that I should seek advice from a licensed financial adviser.
- I acknowledge that my withdrawal will be paid from my future transaction investment option(s).
- The Trustee of Rest will disclose my TFN to another superannuation provider when my benefits are being transferred, unless I request the Trustee of Rest in writing that my TFN not be disclosed to any other superannuation provider.
- I understand that I have the right to ask Rest for information on how withdrawing my super will affect my entitlements and have done so or have chosen not to exercise this right.
- I have read section 6 and I declare that:

I **am** a domestic politically exposed person (If you have ticked this box, please fill in section 6: Domestic politically exposed person characteristics in this form).

Refer to section 6 for further information regarding domestic politically exposed persons.

Signature

(dd/mm/yyyy)

Note: Please initial any corrections you have made on any part of this application. This is important so we can be sure they are genuine changes.



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Section 6: Domestic politically exposed persons

Domestic politically exposed persons (PEP) are people who occupy a prominent public position or function in a government body or department of a State, Territory or the Commonwealth. It also includes their immediate family members and close associates.

The law requires the Trustee to take steps to determine whether any member of Rest is a domestic politically exposed person. This is because the Trustee has some additional obligations when dealing with politically exposed persons.

Please complete the questionnaire below. The following examples are not an exhaustive list and if you have any questions, please contact us.

Do any of the following characteristics apply to you?

- Do you hold a prominent public position or function in government or an organisation such as: the Head of State or government, a government minister, a senior politician, a senior government official, the Governor of the Reserve Bank of Australia, a cabinet member, a senior foreign representative, an ambassador or high commissioner, a diplomat, or a high ranking member of the Australian military such as: General, Admiral or Marshall, or the Board Chair, chief executive or chief financial officer or any other position that has comparable influence in any State enterprise?
- Are you a Judge of a Federal, High or Supreme Court of a State or Territory of Australia?
- Are you a close family member of a PEP being a person who is a spouse, partner, child, sibling, parent or a family member spouse eg sister-in-law or parent-in-law etc?
- Are you a close enterprise or business associate of a PEP being a person who has sole or joint beneficial ownership, control or influence over a legal entity. Close associate also includes a person who has an Acting Authority or is an Authorised Representative for the PEP.

Specific public position, role or rank is:

Country and State, Territory or Region and City/town:

We're here to help.

Our team at Rest is here to help. You can click to chat with our Live Chat team via rest.com.au weekdays 8am - 10pm and Saturday 9am - 6pm (AEST), or ask our Virtual Agent Roger your questions and he'll do his best to point you in the right direction. If you'd like to speak with us, you can call us on 1300 305 778, 8am - 6pm (AEST) weekdays.



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