

CATHOLIC SUPER Pension Plan



Application for a lump sum withdrawal

Address: Level 1, 535 Bourke Street Melbourne VIC 3000; PO Box 333, Collins Street West VIC 8007

Phone: 1300 730 327 **Fax:** (03) 9648 4720 **Email:** info@csf.com.au **Internet:** www.csf.com.au

Please use **BLOCK** letters and **black** ink when completing this form.

This request will be invalid if the form is not signed and dated.

NOTE: The minimum amount you can withdraw is \$2,000.

Section 1: Membership details

Mr/Mrs/Ms/Miss/Dr/Rev	Surname												
Given Names													
Date of Birth (dd/mm/yyyy)						Catholic Super Pension Number							
Residential Address													
Street Number				Street Name									
Suburb / Town						State		Postcode					
Postal Address (if different to residential address)													
Street Number / PO Box				Street Name									
Suburb / Town						State		Postcode					
Telephone (Home)						Telephone (Work)							
Mobile													
Email													

Section 2: Investment options *(Only to be completed if making a partial claim)*

If your plan/membership has more than one investment option, please indicate the investment option(s) and the amount you wish to withdraw from the option(s). If you don't specify any investment option, we will deduct proportionally from each of your investments.

Investment option

	\$								
	\$								
	\$								
	\$								
	\$								
	\$								
TOTAL	\$								

Please show amount(s) as 'all', or specific dollar amount.

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Section 6: Certified proof of identity

You will need to provide **certified documentation** to prove you are the person to whom the superannuation entitlements belong. Please tick the relevant box/es to indicate which of the following acceptable certified documents you have attached to this form. (Only provide original documents if you are submitting this form in person at a Fund office).

EITHER:	OR	AND
<p>One of the following documents only:</p> <p><input type="checkbox"/> A current driver's licence or permit issued under the law of a State or Territory; or</p> <p><input type="checkbox"/> A passport issued by the Commonwealth which can be up to two years out of date;</p> <p>that contains a photograph of the person in whose name the document is issued.</p>	<p>One of the following documents:</p> <p><input type="checkbox"/> birth certificate or birth extract</p> <p><input type="checkbox"/> citizenship certificate issued by the Commonwealth</p> <p><input type="checkbox"/> pension card issued by Centrelink that entitles you to financial benefits.</p>	<p><input type="checkbox"/> notice issued by Commonwealth, State or Territory Government within the past 12 months, containing your name and residential address, recording the provision of financial benefits (Not applicable if you are also providing a pension card)</p> <p><input type="checkbox"/> notice issued by the ATO within the past 12 months that contains your name and residential address</p> <p><input type="checkbox"/> notice issued by a local council or utilities provider within the past three months that contains your name and residential address.</p>

If you are unable to provide accepted certified documents, please contact Catholic Super for other options.

Certification of personal documents

All copied pages of **original** proof of identification documents (including any linking documents) need to be certified as true copies by any individual approved to do so (see below). The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (eg Justice of the Peace, Australia Post employee, etc) and date. The following people can certify copies of the originals as **true and correct** copies:

- a person enrolled on the roll of the Supreme Court of a State or Territory or the High Court of Australia, as a legal practitioner
- a judge of a court
- a magistrate
- a Chief Executive Officer of a Commonwealth court
- a registrar or deputy registrar of a court
- a Justice of the Peace
- a notary public officer (for the purposes of the Statutory Declaration Regulations 1993)
- a police officer
- a permanent employee of the Australian Postal Corporation with five or more years of continuous service who is employed in an office supplying postal services to the public
- an Australian consular officer or an Australian diplomatic officer (within the meaning of the *Consular Fees Act 1955*)
- a finance company officer with five or more years of continuous service with one or more finance companies (for the purposes of the *Statutory Declaration Regulations 1993*)
- an officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having five or more years continuous service with one or more licensees

Section 7: Declaration

I request and authorise that the change(s) I have indicated on this form be made to my Allocated Pension account.

I accept the conditions set out in the Trust Deed and Rules of Catholic Super as amended from time to time.

I have read and understand the Trustee's Privacy Statement contained in the Pension Product Disclosure Statement outlining the manner in which the Trustee complies with the requirements of the Privacy Act 1988 (Commonwealth).

Signature of applicant

Date (dd/mm/yyyy)

Return the completed, signed and dated application to:

Catholic Super
PO Box 333
Collins Street West VIC 8007

THIS PAGE IS PART OF THE CATHOLIC SUPER – PENSION'S LUMP SUM WITHDRAWAL FORM

Please complete and return this declaration with your Pension Withdrawal form

Recent changes to superannuation law mean that you now have to declare whether or not you were a temporary resident when applying to withdraw some or all of your super in cash.

This is because temporary residents can now only claim a cash payment of their super after they have left Australia, or in special circumstances such as permanent or temporary incapacity, terminal illness or death.

Please complete and sign the declaration below and return it to us with your completed Pension Withdrawal form.

We cannot process your payment request without this information.

I, _____ (your full name)

Member number _____ Date of birth ____ / ____ / _____

Of _____

(your address)

declare that:

(please tick the box that applies to you)

1. I am an Australian citizen, New Zealand citizen or permanent resident of Australia;
or
2. I am a temporary resident and one of the following applies:
 - I have left Australia and I am not an Australian citizen, New Zealand citizen or permanent resident of Australia;
 - I hold a Subclass 405 (Investor Retirement) or Subclass 410 (Retirement) visa; or
 - I wish to claim payment on the grounds of permanent incapacity, temporary incapacity or terminal illness or this application to withdraw super is on behalf of a deceased member – if any of these circumstances applies, please contact Catholic Super for assistance.

A temporary resident is someone who holds a temporary visa as described in the Superannuation Industry (Supervision) Regulations 1994 or in the Migration Act 1958

Signed _____ Date ____ / ____ / _____

Please send this declaration with your completed Pension Withdrawal form to:

Catholic Super
PO Box 333
Collins Street West VIC 8007

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