

Benefit Payment Request for Pursuit pensions

Pursuit Select Allocated Pension – SPIN IOF0084AU
Pursuit Select Term Allocated Pension – SPIN IOF0085AU
Pursuit Core Allocated Pension – SPIN IOF0087AU
Pursuit Core Term Allocated Pension – SPIN IOF0088AU

Please use this form to:

- make a lump sum (cash) withdrawal; or
- rollover to another superannuation product.

If you are making more than one withdrawal, please use a separate form for each payment type.

Do not use this form for the following:

- if you are requesting a death benefit payment, please contact a **Client Services Officer** on **1800 062 963**; or
- if you wish to transfer into another IOOF superannuation product, please complete the application forms in the relevant Product Disclosure Statement.

Please complete these instructions in BLACK INK using CAPITAL letters and ✓ boxes where provided.

Please provide your certified proof of identity. Refer to 'Completing proof of identity' in Step 6 for a list of acceptable documentation.

Step 1: Member details

Title (Dr/Mr/Mrs/Ms/Miss)	<input type="text"/>	Surname	<input type="text"/>
Given name(s)	<input type="text"/>		
Mailing address	<input type="text"/>		
Suburb	<input type="text"/>	State	<input type="text"/>
Phone (AH)	<input type="text"/>	Phone (BH)	<input type="text"/>
Account number	<input type="text"/>	Date of birth	<input type="text"/>
Client number	<input type="text"/>		

Note: If you are rolling over your benefit go to Step 3.

Step 2: Conditions for lump sum (cash) withdrawals

If your benefits are preserved or restricted non-preserved you must meet one of the conditions below to make a withdrawal. Please tick the box applicable to your particular circumstance.

- I am aged 55 or more and have permanently retired.
- I am aged 60 or more and have terminated employment with my employer on / /
- I am aged 65 or more.
- I commenced my pension with unrestricted non-preserved benefits.

Step 3: Payment amount

Full withdrawal

Partial withdrawal Amount: \$ (before tax) or Amount: \$ (after tax)

Partial withdrawals only – investment options to be redeemed

Asset code	APIR code	Name	\$ Amount or %

If you do not select the investment options to be redeemed, your investments will be redeemed as follows:

- Pursuit Select Allocated or Term Allocated Pension – as per your nominated top up cash option.
- Pursuit Core Allocated or Term Allocated Pension – from the managed fund with the highest balance.

Step 4: Payment type

Please indicate how you want your benefits paid. For more than one payment type, please use a separate Benefit Payment Request form for each payment.

Please note: Lump sum (cash) withdrawals cannot be paid to third parties.

Cash lump sum withdrawal – direct credit to your account with a bank/financial institution

Your account name

Name of bank/financial institution

Branch BSB – Account number

If direct credit details are not supplied, the payment will be made to you by cheque and sent to the above mailing address.

Rollover to another superannuation fund

Fund name

Fund address

Suburb State Postcode

SFN/ABN#

SPIN#

Account number#

Cheque made payable to

#You can obtain this information from the Fund's product disclosure statement or your latest Member Statement.

Do you need more information about the effect of rolling over on your benefits, including any fees and charges applicable? If so, please contact one of our **Client Services Officers** on **1800 062 963** for further assistance.

Step 5: Member declaration

- I declare that I am either the Member or personal representative of the Member whose details appear above.
- I confirm those details are correct and request the Trustee to pay the benefit as requested in accordance with the provisions of the Trust Deed (subject to any preservation requirements that might apply).

Signature Date / /

Please provide your certified proof of identity. Refer to 'Completing proof of identity' in Step 6 for a list of acceptable documentation.

Step 6: Completing proof of identity

You will need to provide documentation with this transfer request to prove you are the person to whom the superannuation entitlements belong.

ACCEPTABLE DOCUMENTS

The following documents may be used.

EITHER

One of the following documents only:

- driver's licence issued under State or Territory law
- passport.

OR

One of the following documents:

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

AND

One of the following documents:

- letter from Centrelink regarding a Government assistance payment
- notice issued by Commonwealth, State or Territory within the past twelve months that contains your name and residential address. For example:
 - Tax Office Notice of Assessment
 - Rates notice from local council.

HAVE YOU CHANGED YOUR NAME OR ARE SIGNING ON BEHALF OF ANOTHER PERSON?

If you have changed your name or are signing on behalf of the applicant, you will need to provide a linking document. A linking document is a document that proves a relationship exists between two (or more) names.

The following table contains information about suitable linking documents.

Purpose	Suitable linking documents
Change of name	Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office.
Signed on behalf of the applicant	Guardianship papers or Power of Attorney.

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 (e.g. Justice of the Peace, Australia Post employee, etc) and date.

The following can certify copies of the originals as **true and correct** copies:

- a permanent employee of Australia Post with five or more years of continuous service
- a finance company officer with five or more years of continuous service (with one or more finance companies)
- 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
- a notary public officer
- a police officer
- a registrar or deputy registrar of a court
- a Justice of the Peace
- a person enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia, as a legal practitioner
- an Australian consular officer or an Australian diplomatic officer
- a judge of a court
- a magistrate, or
- a Chief Executive Officer of a Commonwealth court.

Post to: Pursuit, Reply Paid 264, Melbourne, VIC 3001

Enquiries: 1800 062 963

Facsimile: 1800 558 539

Trustee: IOOF Investment Management Limited, ABN 53 006 695 021, AFS Licence No. 230524