

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 550 273 **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.

Membership details

Mr/Mrs/Ms/Miss/Dr/Rev	Surname
<input type="text"/>	<input type="text"/>
Given Names	
<input type="text"/>	
Date of Birth (DD/MM/YYYY)	Catholic Super Pension Number
<input type="text"/>	<input type="text"/>
Telephone (Home)	Mobile
<input type="text"/>	<input type="text"/>

Amount of withdrawal

ONE BOX ONLY

Please note that proof of identity must be provided for withdrawals. (See the reverse side for details).

I would like to withdraw the following amount (minimum \$2,000) from my account

My total benefit **or** Partial payment* \$

Partial cash payment and partial rollover (please specify amount)

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

<input type="text"/>	\$	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	\$	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	\$	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	\$	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	\$	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TOTAL	\$	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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

Payment options

ONE BOX ONLY

I would like my lump sum paid as follows

Paid to the same bank account to which my pension is paid **or**

Paid to a different account (please provide details on next page) **or**

Rolled over to an Approved Rollover Fund (please complete the Rollover details on next page)

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Change of Bank Account details

I would like this withdrawal paid to the following account

Name of Bank, Building Society or Credit Union

BSB Number

Account Number

Account Name

I would like all my future pension payments paid into this account

Rollover details

I would like this withdrawal rolled over to the following approved Rollover Fund

Specific name of new fund

Cheque to be made payable to

Name of Fund Administrator (if known)

Address of Fund Administrator (if known)

Street Number / PO Box

Street Name

Suburb / Town

State

Postcode

New Fund membership number

Superannuation fund number of new fund

ABN number of new fund

Certified proof of identity

In order to pay your benefit, we require documentation that proves you are the person to whom the superannuation entitlement belongs. Please attach copies with this form before returning it to Catholic Super so your request can be processed as quickly as possible.

Acceptable documents

If your benefit is less than \$50,000 you should supply one proof of your identity. Please tick the one that you have included:

- | | |
|--|---|
| <input type="checkbox"/> Driver's license | <input type="checkbox"/> Naturalisation papers |
| <input type="checkbox"/> Passport | <input type="checkbox"/> Statutory declaration containing your name and date of birth |
| <input type="checkbox"/> Birth certificate | |

If your payment is \$50,000 or more you should supply two proofs of your identity. Please tick the two that you have included:

- | | |
|--|---|
| <input type="checkbox"/> Driver's license | <input type="checkbox"/> Naturalisation papers |
| <input type="checkbox"/> Passport | <input type="checkbox"/> Statutory declaration containing your name and date of birth |
| <input type="checkbox"/> Birth certificate | |

If your name has changed you must show proof. Please tick the one that you have included:

- | | |
|---|------------------------------------|
| <input type="checkbox"/> Marriage certificate | <input type="checkbox"/> Deed poll |
|---|------------------------------------|

Certification of personal documents

All copies 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 next page).

The person who is authorised to certify documents must sight the original and the copy to 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, Australian Post employee, etc) and date.

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Certified proof of identity *(continued)*

The following people 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
- 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 and Australian consular officer or an Australian diplomatic officer
- a judge of a court
- a magistrate, or
- a Chief Executive Officer of a Commonwealth court.

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

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