



Rest Pension withdrawal form

Complete this form if you would like to:

- apply for a partial lump sum withdrawal (Rest Pension - Retirement Account only)
- apply for a full withdrawal, &/or
- rollover to another super fund.

Thanks for filling out this form - it should only take a few minutes. To help us clearly note your details, please write in CAPITAL LETTERS and use a black or blue pen. Don't forget to sign and date it before you email it (and any attachments) to us at pension@rest.com.au - without your signature and date this form won't be valid.

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 If your account balance is less than \$1,000, then your full account balance will be withdrawn and your account will be closed.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 will be paid in proportion of your tax free and taxable components.

Note: Rest Pension members (excluding Transition to Retirement Pension members) can make partial withdrawals of between \$1,000 and \$10,000 online in 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 Rest Advice before closing an existing pension account.

Section 1: Personal details

Rest Pension member number

Date of birth (dd/mm/yyyy)

Mr/Mrs/Ms/Miss

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 withdraw any preserved or restricted non-preserved benefits unless you have met one of the following conditions of release.

Choose only one option

- you have reached preservation age and are genuinely retired (see the Rest Pension PDS for information about preservation age).
- you are aged 60 or above and have left employment or are changing your employer
- you are totally and permanently disabled or have a terminal illness
- you have approval from the Australian Taxation Office that your money should be released for compassionate reasons.

Section 3: Payment details

If you are closing your account and you haven't received the minimum annual pension payment, we will pay it before we close your account. Normal pension PAYG taxation rates will apply.

Please complete either option 1 or 2 or both options.

Option 1: Pay the following cash amount to me:

- total account balance
- a partial amount of \$

Where do you want the cash withdrawal paid? Either:

Pay this amount to the same bank account as your pension payments (Default if neither selected). Go to Section 5.

OR

- Pay to another bank account:
- Bank account must be held in your name or jointly held in your name,
 - Attach a copy of a bank account statement, and
 - Provide Proof of Identity by completing Section 4: Proof of Identity.

Name of bank or Australian financial institution

BSB number

Account number

Account name

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

Option 2: Rollover the following amount to my Rest superannuation account or another fund:

- total account balance or the balance if also doing a partial cash withdrawal (Option 1).
- a partial amount of \$

Name of rollover fund or SMSF

ABN of rollover fund

Unique Superannuation Identifier (USI) of rollover fund (non-SMSF)

ABN and USI for your rollover fund are available from their website or Product Disclosure Statement.

Membership or account number

Is the fund a self-managed super fund (SMSF)?

No Go to Section 5.

Yes Provide Electronic Service Address (ESA)

- Please attach an SMSF bank statement.
- ESA is available from your SMSF messaging provider or SMSF intermediary (administrator, tax agent or accountant). For more information about ESA, visit ato.gov.au
- You must attach certified copies of your original identification documents. Refer to Section 4: Proof of Identity - certification of documents.

Section 4: Proof of Identity

Complete this section if you would like your withdrawal to be paid to a different bank account to the one in which your pension payments are made or if you are rolling over to your SMSF.

You can select either or both. For further information, refer to the 'Proof of Identity' section at the end of this form.

Electronic verification

I agree to Rest using my Australian driver's licence or Australian passport or Medicare details and the other details on this form to verify my identity electronically using independent data sources.

Australian driver's licence

First name (as shown on your licence)

Surname (as shown on your licence)

Driver's licence number

Middle name(s) (as shown on your licence)

State of issue

Expiry date (dd/mm/yyyy)

Driver's licence **card number** (as shown on your driver's licence – not all states/territories show this number)

Australian passport

First name (as shown on your passport)

Surname (as shown on your passport)

Middle name(s) (as shown on your passport)

Passport number

Medicare card

Card Colour

Green

Yellow

Blue

Medicare number

Individual reference number

Name on card (as shown on your card, including your middle initial)

Expiry date (dd/mm/yyyy)

Provide certified copies of your identification document(s)

I've attached copies of my certified proof of identity with this form. If my identity documentation has not been certified correctly, I understand Rest may use the information on this form to verify my identity electronically using independent data sources. Further information on who and how to certify your documents can be found at the end of this form.

Section 5: Declaration and signature

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.
- I have read the Rest Pension PDS (or relevant PDS), understood the implications of satisfying a condition of release and confirm that I have met a condition of release.
- The information I supplied in this form is true and correct at the date of signing 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 investment option(s) as per my sell down instructions.
- Rest will disclose my TFN to another superannuation provider when my benefits are being transferred, unless I request 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.

Signature

(dd/mm/yyyy)

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 Monday to Friday 8am–8pm or Saturday 9am–5pm (AEST/AEDT). If you'd like to speak with us, you can call us on 1300 305 778, 8am–8pm (AEST/AEDT) Monday to Friday.

Providing proof of identity

When changing your bank details for a pension or rolling over to an SMSF, we need to verify your identity. This can be done via our Electronic verification process or certified by an Authorised Person.

Electronic verification

Rest may be able to verify your identity via a secure electronic verification platform managed by a service provider.

This process will verify your personal details against reliable and trustworthy government and independent sources in real time. This means we can start processing your request straight away. To utilise this method, provide the details of your driver's licence or Australian passport or Medicare card.

Certification by Authorised Person

Alternatively, you can provide certified copies of your identity. 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', their signature, printed name, qualification (eg Justice of the Peace) and date.

Documentation to be certified

The following documents are acceptable as proof of your identity (ID) - either one from type A or two from type B:

A. One of the following documents:

- Current Australian driver's licence containing your photo
- Australian passport (this can be current or if expired less than two years ago)
- Current Australian proof of age card containing your photo (issued under a state or territory law)
- Current driver's licence, passport or similar travel document issued by a foreign government, if it contains your photo and signature[^].

B. If you don't have one of the documents listed above You will need to provide two documents.

One from each group below.

Group 1:

- Birth certificate or extract (if different name)
- Citizenship certificate issued by the Commonwealth of Australia
- Current Pension card issued by Service Australia

Group 2:

Showing your name and residential address:

- notice issued by the Commonwealth, State or Territory that shows you are receiving a financial benefit such as a Centrelink payment notice
- Tax Assessment Notice issued by the Australian Tax Office
- notice issued by a local Government body or utilities provider within the last three months for the provision of services, such as a council rates notice or electricity bill
- if you're under 18, a notice issued by a school principal within the last three months which shows the period of time you've attended the school.

Who is an Authorised Person?

We're unable to accept any documents that have been certified by a family member, friend or tax agent.

An Authorised Person is:

- a Justice of the Peace
- a pharmacist, medical practitioner, nurse, midwife, dentist, optometrist, chiropractor, physiotherapist, occupational therapist, psychologist, architect or veterinary surgeon
- a teacher employed on a permanent basis at a school or tertiary education institution
- a police officer
- a public notary
- a bank, building society, credit union or finance company officer with two or more years of continuous service
- an officer with, or authorised representative of, a holder of an Australian Financial Services Licence with two or more years of continuous service with one or more licensees
- a permanent employee of the Commonwealth or a Commonwealth authority, a State/Territory or a State/ Territory authority or a local government authority, with two or more years of continuous service
- a Member of the Parliament of the Commonwealth, the Parliament of a State/Territory or local government authority of a State/Territory
- an Australian consular or diplomatic officer (within the meaning of the Consular Fees Act 1955)
- a member of the Institute of Chartered Accountants in Australia, CPA Australia or the National Institute of Accountants
- a registrar, deputy registrar or clerk of a court
- a person enrolled as a legal practitioner on the roll of the Supreme Court of a State/Territory or the High Court of Australia
- a judge or magistrate of a court
- a Chief Executive Officer of a Commonwealth Court.

Change of name or signing on behalf of another person

If you have changed your name, or are signing on behalf of another person, you will need to provide a certified linking document that proves a relationship exists between two (or more) names. Suitable linking documents are:

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

[^] Please note: Documents that are not written in English must be accompanied by an English translation prepared by an accredited translator. An accredited translator is any person who is currently accredited by the National Accreditation Authority for Translators and Interpreters Ltd (NAATI) at the level of Certified Translator or above.