



Combined Disability Benefit Withdrawal and Identity Verification Form

Complete all sections of this form to make a full or partial cash withdrawal from your super if the Rest Trustee has approved the early release of your funds under one of the following conditions:

- Total and Permanent Disability
- Terminal Illness.

Please write in **BLOCK LETTERS** using a **BLACK** or **BLUE** pen. This request will be invalid if unsigned and undated. Once you have completed all sections, email the completed form to **claims@rest.com.au** or mail to **PO Box 350, Parramatta NSW 2124**.

Important information

Things to consider before you withdraw funds out of your Rest account:

- any superannuation contributions you are currently receiving from our insurers, AIA Australia Limited or TAL Life Limited, as part of a current Income Protection claim will cease once your Rest account is closed
- any insurance cover you have will cease once your Rest account is closed.

Before making any decision regarding our products, download a copy of the relevant Rest Product Disclosure Statement at rest.com.au or contact us on 1300 300 778.

Section 1: Personal details

Member number

Date of birth (dd/mm/yyyy)

Mr/Mrs/Ms/Miss/Dr

Surname

Given name(s)

Unit number

Street number

Street name

Suburb/Town

State

Postcode

Telephone (business hours)

Mobile

Email address

Your Tax File Number (TFN)

It is not compulsory to provide your TFN. However, if you do not provide your TFN, we may have to deduct a higher tax rate from your account when your benefit payment is made.

Under the Superannuation Industry (Supervision) Act 1993, your super fund is authorised to collect, use and disclose your tax file number. The trustee of your super fund may disclose your TFN to another super provider, when your benefits are being transferred, unless you request the trustee of your super fund in writing that your tax file number not be disclosed to any other super provider.

For more information please contact us on 1300 300 778 or the ATO Superannuation helpline on 13 10 20.

Please go to Section 2

Section 2: Payment details

Rest will pay the benefit directly into your nominated bank account. The bank account listed must be held in your name or jointly held in your name. Please provide your bank details:

- ☐ Electronic funds transfer (EFT). The bank account listed must be held in your name or jointly held in your name.

Name of Australian financial institution

BSB number

Account number

Account name(s)

- ☐ By cheque - please provide your postal address to which this should be sent, if this differs to your residential address:

Postal address

Postcode

Section 3: Benefit payment type

Please tick which benefit type you are requesting payment for:

- ☐ Total and Permanent Disability (TPD)

You are only eligible to withdraw the maximum available amount that has been approved by the Trustee (subject to fluctuations in unit pricing). If any additional personal contributions, rollovers or transfers from another fund have been applied to your account after the date your TPD claim was approved, you may be required to provide further information before they can be withdrawn under TPD. If you are unsure of the amount you are eligible to withdraw under TPD, please contact Rest before completing this form.

- ☐ Terminal Illness

Please tick the option below indicating your withdrawal request:

- ☐ Full cash withdrawal, or ☐ Partial cash withdrawal of \$ (less applicable tax)

- ☐ Maximum amount available under the partial withdrawal conditions. A minimum account balance of \$1000 is required to keep the account and any insurance you have active.

Section 4: Identity Verification

Complete this section if you're making a **cash withdrawal**. You must select either **Option 1: Electronic verification** or **Option 2: Provide certified copies of your identification document**.

Option 1: Electronic verification

By completing my details below, I agree to Rest using my 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)

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

Surname (as shown on your licence)

Driver's licence card number

Driver's licence number

State of issue

Expiry date (dd/mm/yyyy)

Australian passport

First name (as shown on your passport)

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

Surname (as shown on your passport)

Passport number

Medicare card

Card Colour



Green



Yellow



Blue

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

Medicare number

Individual reference no.

Expiry date (dd/mm/yyyy)

Option 2: Provide certified copies of your identification document

I've attached copies of my certified proof of identity with this form (see Section 5: Proof of identity). 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.

Section 5: Proof of Identity (Only if you have not opted in for electronic verification)

How to certify

1. Take a photocopy of the original document.
2. Take both the original document and the photocopy to an authorised person to sight and certify the documents (eg your local police station, see 'who can certify' below for full list).
3. Get an authorised person to stamp or write 'I certify this to be a true copy of the document shown and reported to me as the original', followed by their signature, full name, qualification, registration number (if applicable) and the date.
4. Attach the certified copy of your document to this form.

Documentation

The following documents[^] are acceptable as proof of your identity (ID):

EITHER

One of the following documents only:

- current Australian driver's Licence containing your photo
- Australian passport (this can be current or if expired less than two years ago this will also be accepted)
- 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.

OR

- birth certificate or extract
- citizenship certificate issued by the Commonwealth
- current Pension card issued by the Department of Human Services.

PLUS one of the following documents showing your name and residential address:

- notice issued by the Commonwealth, State or Territory within the last 12 months that shows you are receiving a financial benefit, such as a Centrelink payment notice
- notice issued by the Australian Taxation Office (ATO) within the last 12 months that shows a debt to or refund from the Commonwealth, such as a Tax Assessment notice
- 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 at the school.

[^] 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.

Who can certify?

- a Justice of the Peace
- a pharmacist, medical practitioner, nurse, dentist, optometrist, chiropractor, physiotherapist, psychologist or veterinary surgeon
- a teacher employed on a full-time basis at a school or tertiary education institution
- a police officer
- a notary public
- 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 AFSL 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 or deputy registrar 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.

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

Section 6: Declaration

I declare that:

- all the information I have provided on this form is true and correct
- I am an Australian citizen, a New Zealand citizen or a permanent resident of Australia or I hold a Subclass 405 (Investor Retirement) or Subclass 410 (Retirement) visa. If you do not meet these residency requirements, please contact us on 1300 300 778.

I have attached certified proof of my identity which shows my correct date of birth and name change(s) if required.

I am withdrawing my super from Rest and understand that:

- any insurance cover that may apply will cease once my Rest account is closed
- if I am a member of Rest Super, my insurance will continue provided I am eligible, my account remains open and has enough money to cover my insurance premiums
- 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
- Rest may not be able to pay my benefit until they have received confirmation of my employment status from my employer or receive a final contribution to my Rest account (if applicable).

Name (please print)

Signature

(dd/mm/yyyy)