



Rest Pension withdrawal form

Complete this form if you would like to apply for a lump sum withdrawal (commutation) or if you would like to roll your Rest Pension to another fund.

Write in **BLOCK LETTERS** and use a **BLACK** or **BLUE** pen. This request will be invalid if unsigned and undated.

Once you've completed and signed this form, mail to: **PO Box 350, Parramatta NSW 2124.**

Note: Account-based 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)

Gender

 (M/F)

Title

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 have reached age 65
- you are totally and permanently disabled or have a terminal illness
- you are a former temporary resident and have permanently departed Australia (excluding New Zealand citizens)
- you have approval from the Australian Taxation Office that your money should be released for compassionate reasons.

Note: Any payments will first be made from your unrestricted non-preserved benefit, followed by your restricted non-preserved and preserved components.

Section 3: Payment details

Government regulations require that in some cases, before making a withdrawal payment, Rest must first make a pension payment equal to the accrued minimum annual pension amount. Therefore, if you have elected to have your pension paid quarterly, half-yearly or yearly, any difference between the current accrued minimum annual pension amount and any pension payments that have already been made, will be paid as a regular pension payment before we complete your withdrawal. Normal pension PAYG taxation rates will apply.

Please complete either option 1 or 2 only.

Option 1: Pay the following cash amount to me:

- my total account balance
- a partial amount of \$

This amount will be credited to your nominated bank account.

Account-based pension members (excluding Transition to Retirement Pension members) can make partial withdrawals of between \$1,000 and \$10,000 by logging into MemberAccess at rest.com.au

Any partial payments must be paid in proportion to your tax free and taxable components.

Complete the following if you would like your withdrawal payment to be paid to a different bank account from your nominated bank account for your regular pension payments.

Note: You will need to supply a copy of your bank account statement if you nominate a different bank account from your nominated bank account.

Name of Australian financial institution

BSB number

 -

Account number

Account name

The account details must be held in your name or jointly held in your name.

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

OR

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

- my total account balance
- 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 next section

- 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

Note: 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.

Section 4: 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, 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 application 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 future transaction investment option(s).
- 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.
- I have read section 5 regarding domestic politically exposed persons and I declare that:

I am a domestic politically exposed person

(If you have ticked this box, please also complete section 5 below)

Signature

(dd/mm/yyyy)

Note: Initial any corrections you have made on any part of this application. This is important so we can be sure they are genuine changes.

Section 5: Domestic politically exposed persons

Domestic politically exposed persons (PEP) are people who occupy a prominent public position or function in a government body or department of a State, Territory or the Commonwealth. It also includes their immediate family members and close associates.

The law requires the Trustee to take steps to determine whether any member of Rest is a domestic politically exposed person. This is because the Trustee has some additional obligations when dealing with politically exposed persons.

Please complete the questionnaire below. The following examples are not an exhaustive list and if you have any questions, please contact us.

Do any of the following characteristics apply to you?

- Do you hold a prominent public position or function in government or an organisation such as: the Head of State or government, a government minister, a senior politician, a senior government official, the Governor of the Reserve Bank of Australia, a cabinet member, a senior foreign representative, an ambassador or high commissioner, a diplomat, or a high ranking member of the Australian military such as: General, Admiral or Marshall, or the Board Chair, chief executive or chief financial officer or any other position that has comparable influence in any State enterprise?
- Are you a Judge of a Federal, High or Supreme Court of a State or Territory of Australia?
- Are you a close family member of a PEP being a person who is a spouse, partner, child, sibling, parent or a family member spouse eg sister-in-law or parent-in-law etc?
- Are you a close enterprise or business associate of a PEP being a person who has sole or joint beneficial ownership, control or influence over a legal entity. Close associate also includes a person who has an Acting Authority or is an Authorised Representative for the PEP.

Specific public position, role or rank is:

Country and State, Territory or Region and City/town:

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 weekdays 8am-10pm, Saturday 9am-6pm and Sunday 10-6pm (AEST), or our Virtual Agent Roger can answer general questions or point you in the right direction 24/7. If you'd like to speak with us, you can call us on 1300 305 778, 8am-6pm (AEST) weekdays.

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