

# Pension claim form

Read all the information on the back of this form to help you complete your pension claim request correctly. This request will be invalid if unsigned or undated and will be returned to you for completion. Attach any associated documentation before returning it to legalsuper. Please use **BLOCK letters and black ink** when completing this form.

Return this completed form to:  
 legalsuper pension  
 Locked Bag 5042  
 Parramatta NSW 2124  
 Phone: 1800 623 502  
 Fax: 1300 663 844  
 Email: mail@legalsuper.com.au

## 1. Payment type

- A.  Rollover all or part of your benefit to another fund  
 B.  Cash payment

Indicate either:

Full benefit  OR partial benefit \$  .

Following changes to government regulations, you can now leave your money in super with legalsuper for as long as you like.

## 2. Personal details

legalsuper Member Number

Mr  Mrs  Ms  Miss  Dr  Justice

Surname

Given Names

Date of birth (dd/mm/yyyy)

Postal Address

Town or Suburb

State Postcode

Telephone Number

Mobile Number

Email



## 3. Rollover fund details

I want to roll over:

- A.  my total benefit B.  my preserved portion only

Partial payments must be paid in proportion to your legalsuper account's taxable and tax-free components.

Name of rollover fund

Member policy/Plan number (if known)

Rollover fund ABN (required if rollover is to a superannuation fund)

SPIN Number (please obtain this number from the rollover fund)

Cheque to be made payable to



Street/Unit No.

Street Name

Suburb/Town/City

State Postcode

## 4. Retirement

I declare that I am:

- A.  Age 55 or over and have permanently retired  
 B.  Age 60 or over and have ceased an employment arrangement  
 C.  Age 65 or over (NB: you can still be working)

## 5. Cash payment declaration

I declare that I am:

- A. an Australian citizen, New Zealand citizen or permanent resident of Australia; or  
 B. a temporary resident and I hold a Subclass 405 (Investor) or Subclass 410 (Retirement) Visa.

If neither of the above applies to you, contact legalsuper for assistance.

If you would like your payment deposited into your bank account, please provide the following:

BSB

Account No.

## 6. Declaration

- Where the full balance of my account is to be paid from legalsuper, I hereby release the Trustee from any further liability to me or my executors, administrators or dependants in respect of my participation in legalsuper, and request and authorise the termination of my membership in the Fund.
- I approve the deduction of benefit payment fees (if any) from my benefits on exit (subject to legislative restrictions).
- I have read the notes overleaf and declare that the information supplied by me is correct.
- I have attached original certified documents, and they have not been self-certified.

Member's signature

Date (dd/mm/yyyy)

<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"/>
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## Compulsory details

As a minimum, we need your membership number, full name and date of birth details to process your request. Please do not use initials. Benefits will be paid in full unless a partial benefit amount is indicated in Section 1.

## Payment type (Section 1)

### A. Rollover all or part of your benefit to another fund

Tax will not be deducted when you roll over your benefit.

To roll over your benefits to another fund:

1. Tick the 'Rollover' box A in Section 1.
2. Complete Sections 2, 3 and 6.
3. Send the benefit payment request to legalsuper.\*

### B. Retirement benefit

To claim all or part of your retirement benefit:

1. Tick the 'Cash payment' box B in Section 1.
2. Complete Sections 2, 4, 5 and 6.
3. Send the benefit payment request to legalsuper.\*

## Fees

A \$50 Benefit Processing Fee will apply to all claims paid other than transfers to a legalsuper pension.

## Declaration (Section 6)

You must sign and date Section 6 and return the completed form to us.

\* together with certified identification as noted on this page.

## Privacy

Please note that by sending legalsuper personal information about yourself, you are agreeing to the following:

1. That you have read the legalsuper privacy statement which may be obtained from the Pension Product Disclosure Statement and understand how legalsuper intends to protect your personal details, particularly in relation to the collection, storage, quality, use and disclosure (sharing) of personal information.
2. That legalsuper can use your personal information for the purposes of running your superannuation account. If you have any questions about your rights under the privacy legislation, please call legalsuper on freecall **1800 623 502**.

## Completing proof of identity requirements

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

The following documents may be used:

### Benefits less than \$5000

Either an original or a certified copy of **one** of the following documents:

- A current Driver's licence issued under State or Territory law;
- An Australian Passport (the passport must be current or must have expired in the last two years);
- A Passport that contains a photograph and your signature issued by a foreign government, the United Nations or an agency of the United Nations that, if it is written in a language that is not understood by the person carrying out the verification, is accompanied by an English translation prepared by an accredited translator.

### Benefits over \$5000 or claiming retirement/cash payment

You will need to provide **one** of the documents specified above in addition to **one** current bill or bank statement with current mailing address.

If you are unable to provide the documents requested above, contact legalsuper on **1800 623 502** to confirm which alternative documents you may provide.

**Please note that all identification documents provided must be originals or certified copies. We have attached a list of individuals who can certify documents.**

A certified copy means a document that has been certified as a true copy of an original document by one of the following persons:

- a person who is enrolled on the roll of Supreme Court of a State or Territory, or the High Court of Australia, a legal practitioner (however described);
- a judge of a court;
- a magistrate;
- a chief executive officer of a Commonwealth court;
- a registrar or deputy registrar of a court;
- a Justice of the Peace;
- a notary public (for the purposes of the Statutory Declaration Regulations 1993);
- a police officer;
- an agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public;
- a permanent employee of the Australian Postal Corporation with 2 or more years of continuous service who is employed in a office supplying postal services to the public;
- an Australian consular officer or an Australian diplomatic officer (within the meaning of the Consular Fees Act 1955);
- an officer with 2 or more continuous years of service with one or more financial institutions (for the purposes of the Statutory Declaration Regulations 1993);
- an officer with, or authorised representative of, a holder of an Australian financial services licence, having 2 or more continuous years of service with one or more licensees;
- a member of the Institute of Chartered Accountants in Australia, CPA Australia or the National Institute of Accountants with 2 or more years of continuous membership.