





☐ Yes  
(Move to next question)

☐ No  
(Please contact us, as this is not the correct form)

☐ Yes  
(Please provide details below)

☐ No  
(Move to next question)

Full Payment

☐ Partial Payment:  
(Complete amount required)

[illegible]

### 3. PAYMENT DETAILS:

Name of Financial Institution:																														
BSB Number:							Account Number:																							
Account Name: (e.g. John Smith)																														

Payments cannot be made to a credit card account or a third party bank account. If no details are provided or acceptable proof of the bank account details is not provided, a cheque will be mailed to your postal address.

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## 5. TAX DEDUCTION:

Yes  
(Attach a valid Notice of intent to claim a tax deduction form)

☐ No

You may not be able to claim a tax deduction or vary any submitted notice once your withdrawal has been processed.



# WITHDRAWAL REQUEST

## 6. DECLARATION AND SIGNATURE:

**By signing this form I am making the following statements:**

- I declare I have fully read this form and the Important Information section and the information completed is true and correct.
- I authorise the withdrawal from my account as specified in this form.
- I am aware I may ask Nationwide Super for information about any fees or charges that may apply, about the effect on my insurance cover or any other information about the effect this withdrawal may have on my benefits, and do not require any further information.
- I discharge Nationwide Super from any further liability in respect of the benefits paid.
- I have met the conditions for eligibility to withdraw my superannuation benefit.

x

Signature

Date:

Please return your completed form along with any applicable documents to **Locked Bag 5215 Parramatta NSW 2124**

## IMPORTANT INFORMATION

**Please Note:**

- All withdrawals will be processed within 5 working days of the receipt of the completed documentation and final contributions.
- If you don't provide us with all the information requested, this request may be delayed or the form may be returned to you.
- If you have funds invested in more than one investment option, please provide separate written instructions indicating which investment option(s) you would like your withdrawal to be deducted from. If you do not provide an instruction, your withdrawal will be deducted pro-rata across your investment options.
- Any insurance cover you hold within Nationwide Super will cease upon making a full withdrawal.
- Should further contributions be made to Nationwide Super on your behalf after you have made a full withdrawal, a new account will be opened for you. This *Withdrawal Request* form will not apply to the new account.

**Proof of Identification:**

- You must provide a certified photocopy of your identification (e.g. drivers licence) with this withdrawal request (unless you have provided acceptable identification to us within the last 12 months which is still current).
- Please note, for payments of less than \$5,000, your proof of identification document(s) does not need to be certified as a genuine copy by an authorised person – a simple photocopy will suffice.
- Please refer to *A Guide to Certifying Documents*, available at [nationwidesuper.com.au/forms](http://nationwidesuper.com.au/forms) or by contacting us, for instructions on how to have your identification certified as a genuine copy by an authorised person (e.g. Justice of the Peace) – required for payments of \$5,000 or more.
- If you have changed your name, please provide us with a certified copy of this name change e.g. Marriage Certificate.

**Proof of Bank Account Details:**

- You must provide proof of your bank account details, such as a bank account statement or welcome letter issued by your financial institution within the last 3 months or an internet banking screenshot, showing a login date within the last 3 months (unless you have provided acceptable proof of your bank account to us within the last 12 months). This bank document needs to show your account number and your name or account name.
- For payments of \$50,000 or more, the proof of your bank account details must be certified as a genuine copy by an authorised person (e.g. Justice of the Peace). Please refer to *A Guide to Certifying Documents*, available at [nationwidesuper.com.au/forms](http://nationwidesuper.com.au/forms) or by contacting us for instructions on how to have your bank document certified.
- If you are unable to provide acceptable bank documents, payment will be made by cheque sent to your postal address.

**Fees & Tax:**

- A termination (exit) fee of \$70 will apply when you withdraw your full benefit from Nationwide Super and close your account.
- Note that under legislation, you are unable to specify which tax components you withdraw when claiming a partial benefit.
- Withholding tax may be applied to payments if you are under 60 years of age.



# WITHDRAWAL REQUEST

## Prominent public position:

- We are required by law to ask whether you or a family member or associate hold a prominent public position. We cannot process your request if you do not provide an appropriate response.
- Examples of prominent public positions include positions such as a government minister, ambassador, judge, a high level armed forces officer or a chief executive of an international organisation.

## Distribution of Investment Earnings:

Upon your withdrawal, an interim rate of investment earnings will be applied to your account. The interim rate is determined on a weekly basis and is calculated based on net investment returns to date after allowing for an estimate of tax and expenses. For an estimate of your withdrawal benefit, please contact us.

## Payment Type Definitions:

### - Age 65

No other conditions apply.

### - Retirement

You must generally meet one of the below conditions in order to access your super:

#### Aged between your preservation age (see below table) to 59

An arrangement under which you were gainfully employed has come to an end and you intend to never again become gainfully employed for 10 hours or more each week.

#### Aged 60 to 64

On or after reaching age 60, an arrangement under which you were gainfully employed has come to an end.

OR

← Same as Aged between preservation age to 59 condition.

\*Gainfully employed means employed or self-employed for gain or reward in any business, trade, profession, vocation, calling, occupation or employment.

## Preservation age table

The preservation age is set by the government and is dependent on your date of birth, as follows:

Date of Birth	Preservation Age
Before 1 July 1960	55
From 1 July 1960 to 30 June 1961	56
From 1 July 1961 to 30 June 1962	57
From 1 July 1962 to 30 June 1963	58
From 1 July 1963 to 30 June 1964	59
On or after 1 July 1964	60

### - Unrestricted Non-Preserved Benefit

You can access any unrestricted non-preserved benefits at any time.

### - Specified Compassionate Grounds (administered by the Australian Taxation Office)

There are limited circumstances where benefits may be released on specified compassionate grounds. Please refer to *Information Sheet: Early Release of Benefits due to Specified Compassionate Grounds*, [www.ato.gov.au](http://www.ato.gov.au) or contact the ATO on 13 10 20 for further details.

### - Balance under \$200

You can access your full super benefit of less than \$200 if your account balance was less than \$200 when you left a job prior to 1 July 2016 where your employer was contributing to Nationwide Super on your behalf.

## Anti -Money Laundering and Counter -Terrorism Financing Act 2006 (AML/CTF Act)

The AML/CTF Act requires the Trustee to identify, monitor and mitigate the risk of Nationwide Super being used to launder money or finance terrorism. This will involve obtaining additional information to identify members and verifying the authenticity of the information collected. The Trustee may delay or refuse any request for payment of a benefit where satisfactory proof of identity is not provided or where the Trustee forms the view that the payment of the benefit may result in a breach of the AML/CTF Act.

## Contact Nationwide Super

**P:** 1800 025 241

**E:** [enquiries@nationwidesuper.com.au](mailto:enquiries@nationwidesuper.com.au)

**W:** [nationwidesuper.com.au](http://nationwidesuper.com.au)