

Suncorp WealthSmart® Pension withdrawal form



Suncorp Portfolio Services Limited (Trustee)
ABN 61 063 427 958 AFSL 237905 RSE L0002059
USI RSA0002AU

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Please use this form to make a cash withdrawal from your Suncorp WealthSmart pension account or transfer to another super fund.

Tips to help you complete this form

- Use blue or black pen and BLOCK letters
- Use a cross (X) to mark answer boxes
- Complete all sections of the form and sign and date on the last page.

Any questions? If you'd like help completing this form, or if you have any questions, just call us on 13 11 55 and ask for 'Super' between 8am to 6pm (Eastern Standard Time) Monday to Friday

1. Personal details

Suncorp WealthSmart account number

Title

Last name

Given name(s)

Date of birth / /

Daytime phone number Mobile

Residential address (sorry – we can't accept PO Boxes)

Street address

Suburb/Town

State Postcode

Postal address (if different from above)

Street address/
PO Box

Suburb/Town

State Postcode

2. Reason for withdrawal

This section only needs to be completed by members who chose the transition to retirement feature when they set up their account. The transition to retirement feature allows members aged 55 or older to access their super benefits as an income stream while continuing to work.

All other members should go straight to section 3.

Please cross (X) the appropriate box. We can't process your withdrawal unless you satisfy one of the conditions below.

- I'm transferring to another transition to retirement pension.
- I'm withdrawing to pay a superannuation contribution surcharge.
(You'll need to supply evidence of the superannuation surcharge assessment from the Australian Taxation Office.)
- I'm withdrawing to give effect to a family law payment split.
(You'll need to supply an original certified copy of the court order. If you're not the account holder, you'll need to supply a Regulation 72 Notice. A Regulation 72 Notice must contain the non-member spouse's full name, full address, date of birth and if they're a member of the Suncorp Master Trust, their membership number).
- I'm withdrawing to contribute the money back to the accumulation phase of a superannuation product.
- I'm withdrawing as I satisfy one of the following conditions:
 - I've reached age 65.
 - I've ceased employment since turning 60 (but I'm not necessarily retired).
 - I'm withdrawing an 'unrestricted non-preserved' amount.
 - I've retired and have no intention of becoming gainfully employed in the future for 10 hours or more per week.

Date retired / /

3. Withdrawal request

Please select one of the following:

i) Partial withdrawal

I'd like to make a partial withdrawal and keep my account open. I understand that if I have an investment in Suncorp WealthSmart Term Deposits, my term deposit(s) may be broken and an interest adjustment applied to fund this withdrawal and/or keep my account within the maximum 70% balance threshold for term deposit investments.

ii) Full withdrawal

I'd like to withdraw all my funds and close my account and any investments I hold in Suncorp WealthSmart Term Deposits will be broken and an interest adjustment applied.

Continue to section 4 if you're transferring the withdrawal amount to another superannuation fund.

Continue to section 5 if you'd like to make a cash withdrawal.

4. Transfer payment details (please complete if you're transferring the withdrawal amount to another superannuation fund)

Please provide all of the information below. We can't process your request unless it's all provided.

Full name of new fund

Unique superannuation identifier (USI) of new fund

ABN of new fund

New fund address

State Postcode

Member/Account number

Transfer this amount: (partial transfers only) \$, , .

If you're transferring to a self managed super fund, please provide evidence of your membership in the fund (in the form of either the Trustee meeting minutes or your contribution statement)

5. Cash payment details (please complete if you'd like to make a cash withdrawal)

Please pay it to the bank account you already pay my pension payments to.

or

Please pay it to the bank account below.*

Bank account details

Account name

Name of Australian financial institution

Branch name or address

Branch BSB - Account number

* We can only pay to a bank account in your name or a joint bank account of which you're one of the account holders.

Partial withdrawals only

Cash amount: \$, , .

Before tax After tax (Note – If you don't specify we'll assume the amount specified above is before tax.)

6. Investment option details (partial withdrawals only)

Please indicate the investment option(s) that you'd like your withdrawal to be paid from. If no selection is made, the Trustee will use its discretion to determine which investment option(s) will be used to make up this payment.

PART A

Term deposits

Please note: Suncorp WealthSmart Term Deposits cannot form part of your pension payment strategy

Suncorp WealthSmart Term Deposit†	Term _____	Maturity date _____
Only full withdrawals of a Suncorp WealthSmart Term Deposit are permitted.	Term _____	Maturity date _____
	Term _____	Maturity date _____
	Term _____	Maturity date _____

† If you don't provide the term and maturity date of the term deposit(s) you'd like to break, we'll break the Suncorp WealthSmart Term Deposit closest to maturity. If you have more than four term deposits that you would like your withdrawal to be paid from, please photocopy this page.

Diversified investment options

Amount

Suncorp Lifestage Fund	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Secure											
Suncorp Secure Portfolio	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Conservative											
Suncorp Conservative Portfolio	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Balanced											
Suncorp Balanced Portfolio	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Growth											
Suncorp Growth Portfolio.....	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
High growth											
Suncorp High Growth Portfolio	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]

Single sector investment options

Cash

Suncorp Bank Deposit Fund	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Suncorp Cash Fund	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Suncorp Guaranteed Cash Fund	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]

Australian fixed interest

Tyndall Australian Bond Fund.....	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Vanguard® Australian Fixed Interest Index Fund	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]

International fixed interest

Vanguard® International Fixed Interest Index Fund (Hedged)	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
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Diversified fixed interest

Macquarie Diversified Fixed Interest Fund.....	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
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Diversified income

Colonial First State Global Credit Income Fund.....	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
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Australian property

RREEF Paladin Property Securities Fund	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Vanguard® Property Securities Index Fund	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]

International property

Vanguard® International Property Securities Index Fund (Hedged)	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
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Australian shares

Ausbil Australian Active Equity Fund.....	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
BT Wholesale Imputation Fund	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Fidelity Australian Equities Fund	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Ibbotson Australian Shares Active Trust	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Perennial Growth Shares Wholesale Trust	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Perpetual Wholesale Industrial Fund.....	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Suncorp Australian Shares Fund.....	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Tyndall Australian Share Wholesale Portfolio	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Vanguard® Australian Shares Index Fund.....	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]

Australian shares – specialist

Ausbil Australian Emerging Leaders Fund	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Perpetual Wholesale Geared Australian Fund.....	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Tyndall Australian Share Income Fund	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Zurich Investments Equity Income Fund.....	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]

International shares

Grant Samuel Epoch Global Equity Shareholder Yield (Unhedged) Fund	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Platinum International Fund	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Suncorp Global Shares Fund	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Vanguard® International Shares Index Fund.....	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Walter Scott Global Equity Fund	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]

International shares – specialist

BlackRock Global Allocation Fund.....	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Colonial First State Global Resources Fund	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]
Lazard Global Small Cap Fund	\$	[]	,	[]	,	[]	,	[]	.	[C]	[C]

