

CLAIM MY BUSSQ SUPER - INCOME ACCOUNT

Please complete and sign this form and return to: BUSSQ GPO Box 2775, Brisbane QLD 4001.

Withdrawals under \$10,000 can be made online via MemberAccess or by calling us on **1800 MY BUSSQ (1800 69 2877)**.

1 PERSONAL DETAILS

BUSSQ member number (if known)

Mr/Mrs/Ms/Miss

Given names

Surname

Date of birth (dd/mm/yyyy)

Daytime contact number

Mobile

Email

Street address

Suburb/Town

State

Postcode

Postal address

Suburb/Town

State

Postcode

Tick if same as street address

2 AMOUNT OF WITHDRAWAL

I would like to withdraw the following amount (minimum \$1000) from my account.

An amount of \$ Amounts are net of any applicable tax.

The balance of my account

3 INVESTMENT OPTIONS

I would like the withdrawal to be made: From my current payment option, or

From investment option.

4 PAYMENT OPTIONS

I would like my lump sum paid as follows:

Paid to the same bank account to which my pension is paid, or

Paid to a different account (see Section 5), or

Rolled over to a complying super fund (see Section 7), or

Rolled over to a BUSSQ Super account

BUSSQ Member number (if known)

Please open a new BUSSQ Premium Choice account for me
(Please note: your investment options will remain the same.)

5 FINANCIAL INSTITUTION DETAILS

STOP

Please attach a copy of a current bank statement confirming your name, BSB and account number to confirm your details.

Financial institution name

Name in which account is held (must be your name or jointly in your name)

BSB number

Account number

6 AGE DECLARATION

I declare that I:

- Have unrestricted non-preserved money in my Income account.
- Am over preservation age and permanently retired.
- Am over age 60 and have ceased employment.
- Am over age 65 (you may still be employed).

7 ROLLOVER DETAILS

Please complete this section to roll over your Income account to another fund.

Name of new fund

New fund membership number

USI/SPIN number of new fund

ABN of new fund

8 RESIDENCY DECLARATION

I declare that: *(Please tick the box that applies to you)*

- I am an Australian citizen, New Zealand citizen or permanent resident of Australia, or
- I hold a Subclass 405 (Investor Retirement) or Subclass 410 (Retirement) visa.

**A temporary resident is someone who holds a temporary visa as described in the Superannuation Industry (Supervision) Regulations 1994 or in the Migration Act 1958.*

9 AUTHORISATION

- I request a lump sum be paid as I have indicated on this form from my Income account.
- I am aware that before I rollover to a new fund I should obtain all relevant details of the BUSSQ fund, and I understand and acknowledge the implications of transferring my benefits.
- If I have requested a new BUSSQ Premium Choice account be opened for me I declare that I have read and understood the Premium Choice Product Disclosure Statement (PDS) available at bussq.com.au.
- I accept the conditions set out in the Trust Deed and Rules of BUSSQ as amended from time to time. They are available at bussq.com.au/disclosure
- I have read and understand the Income account PDS.
- I declare that I have fully read this form and that the information completed on this form is true and correct.

STOP

PLEASE SIGN AND DATE.

Forms without both a signature and date are unable to be processed.

Signature of applicant

Dated (dd/mm/yyyy)

SIGN
HERE



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10 PRIVACY

BUSSQ collects and uses your personal information in accordance with the BUSSQ Privacy Statement which is available from our website or by calling **1800 MY BUSSQ (1800 69 2877)**. Please call us if you have any questions about your rights under the privacy legislation.

To make a claim on your super, open an Income account and to perform certain other transactions, BUSSQ requires you to prove your identity. Certified copies of the following documents can be used to do this:

One of the following documents only:

- A current driver's licence or permit issued under the law of a State or Territory, or
- A passport issued by the Commonwealth which can be up to two years out of date, that contains a photograph of the person in whose name the document is issued.
- Proof of Age Card
 - A card issued under a law of a State or Territory for the purpose of providing the person's age which contains a photograph of a person in whose name the documents is issued (includes Proof of Age Card or National Identity Card); or
- National Identity Card
 - A card issued for the purpose of identification that contains a photograph and the signature of the person in whose name the document is issued; and
 - Is issued by a foreign government, the United Nations or an agency of the United Nations; and
 - If it is in a language that is not understood by the person carrying out the verification it must be accompanied by an English translation prepared by an accredited translator.

OR

One of the following documents:

- Birth certificate or birth extract
- Citizenship certificate issued by the Commonwealth
- Pension card issued by Centrelink that entitles you to financial benefits.

AND

One of the following documents:

- Letter from Centrelink regarding a Government assistance payment
- Notice issued by Commonwealth, State or Territory Government within the past 12 months, containing your name and residential address.
For example:
 - Tax Office Notice of Assessment
 - Rates notice from local council

Certifying your documents

All copies of proof of identity documents should be certified as a true copy of the ORIGINAL by an authorised person. Some examples of authorised persons are:

- A Justice of the Peace or Commissioner for Declarations
- A Police Officer
- A finance company officer or representative of an AFSL license holder with 5 or more years continuous services with one or more licensees
- A lawyer, judge or magistrate
- A notary public

The certifier must sight the original and make sure both documents are identical, and then make sure all photocopied pages are certified as true copies by writing or stamping wording to that effect followed by their:

- Signature
- Name
- Qualification
- Date, and
- Phone number

Electronically confirming your identity

For certain transactions BUSSQ can electronically confirm your identity. You can arrange this by calling us on **1800 MY BUSSQ (1800 69 2877)**.

You will need to provide your drivers license or passport number and we will ask for your consent before using this service.



I certify this is a true copy of the original document.

Julie Preston

Julie Preston
Justice of the Peace
19/06/2015
0412 345 678

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