

1 MEMBER DETAILS

Member Number (if known)		Date of Birth (dd/mm/yyyy)	
<input type="text"/>		<input type="text"/>	
Title (Mr/Mrs/Ms etc)	Surname	Given Names	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Address			
<input type="text"/>			
Suburb/Town		State	Postcode
<input type="text"/>		<input type="text"/>	<input type="text"/>
Phone (home)		Phone (work)	
<input type="text"/>		<input type="text"/>	
Termination date with previous employer (dd/mm/yyyy)			
<input type="text"/>			

2 REASON FOR REQUEST

Preserved benefits may not be paid out in cash until the occurrence of any of the following events, evidenced in writing:

<input type="checkbox"/> Retiring on or after your preservation age	<input type="checkbox"/> Ceasing an employment arrangement on or after reaching age 60	<input type="checkbox"/> Reached age 65
<input type="checkbox"/> Total and permanent disablement	<input type="checkbox"/> Death (see overleaf)	<input type="checkbox"/> ~Severe financial hardship
<input type="checkbox"/> *Compassionate grounds	<input type="checkbox"/> Unrestricted non-preserved component	<input type="checkbox"/> Account balances less than \$200
<input type="checkbox"/> Rollover to another complying Superannuation Fund		

Notes ~ Severe Financial Hardship requires a Financial Hardship declaration.
 * Benefits for compassionate grounds require letter of approval from APRA.
 Payment of benefits may be subject to advice of cessation of employment from your previous employer.
 Payments are made net of lump sum tax and Medicare levy that we are required to deduct. If you do not quote your tax file number (overleaf) your benefit will be taxed at the highest marginal tax rate plus Medicare Levy.
 Payments to members are subject to any preservation restrictions listed overleaf.
 If you are a temporary resident departing Australia permanently, please contact the Client Services Team as you will need to complete a separate Payment Request Form.

3 PROOF OF IDENTITY

You will need to provide us with Certified ID in order to have your Benefit Payment request processed.

I have attached a certified copy of my driver's licence or passport

OR

I have attached certified copies of both:

<input type="checkbox"/> Birth/Citizenship Certificate or Centrelink Pension Card	AND	<input type="checkbox"/> Centrelink payment letter of Government or local council notice (less than one year old) containing my name and address
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4 BENEFIT PAYMENT OPTIONS

Choose one of the 3 options below and then select if Full or Partial withdrawal requested.

<input type="checkbox"/> Transfer my benefit to:	<input type="checkbox"/> LifeFocus Pension Fund	
<input type="checkbox"/> Rollover: (Please complete Section 5)	<input type="checkbox"/> Full Rollover	\$
	<input type="checkbox"/> Partial Rollover – please indicate amount	
<input type="checkbox"/> Payment to member: (Please complete Section 6 for Partial Withdrawal)	<input type="checkbox"/> Full withdrawal	\$
	<input type="checkbox"/> Partial withdrawal – please indicate amount	

7 ADDITIONAL DECLARATION

If any part of your benefit paid in cash includes a preserved benefit you **MUST** also sign this declaration.

I confirm that I am over 65 I am over age 60 and have terminated employment

I have attained my preservation age and am permanently retired from the workforce (i.e. working less than 10 hours per week)

Signature

Date

8 PAYMENT DETAILS

Please tick a box to indicate payment method:

Cheque Made payable to:

Direct Credit (complete section below)

Financial Institution Name

Address

Suburb/Town

State

Postcode

Name of Account

BSB Number

Account Number

Please note: Payments for Superannuation monies cannot be paid into Third Party bank accounts. Accounts must be in the name of the client. For Rollovers to another complying Superannuation Fund, we require one of the following:

A bank statement showing bank details of the superannuation fund or a letter signed by the Trustee of the fund giving details of the bank account, in the name of the Superannuation Fund.

9 TERMINATION PAYMENT TAX FILE NUMBER NOTIFICATION

You may choose to quote your Tax File Number to an organisation paying you a termination payment.

This section is to be used for the following purposes:

- To provide your Tax File Number to your superannuation fund on the termination of your employment;
- To authorise your superannuation fund to provide your Tax File Number to the Australian Taxation Office.

If your withdrawal benefit from this plan is being rolled over, in full, to any approved superannuation fund/s, you are not required to complete this Tax File Number Notification.

NOTE: If your Tax File Number is not provided to us for withdrawals, your benefit will be taxed at the highest marginal rates plus Medicare levy.

Tax File Number

Signature

Date (dd/mm/yyyy)

10 DEATH CLAIM

If you are applying for a death claim on behalf of a deceased member, please contact the administrator for current requirements relevant to the claim on 1300 137 909.

11 CONTINUATION OF INSURANCE OPTION

When an insured member ceases employment other than for disablement or invalidity, the member may continue their cover up to the amount currently insured under LifeFocus Superannuation Fund. No evidence of health is required providing the option is exercised within 30 days of ceasing employment, and the member is less than 60 years of age.

The replacement cover policy will contain only the usual terms and conditions applying to similar policies issued at the time by the Insurer to members of the public. Special provision or additional benefits which involve additional or increased premiums will not be available. Should you wish to obtain replacement cover, please contact the Trustee.

12 RESIDENCY STATUS

Are you a permanent resident? Yes No

Comments:

13 REQUEST FOR INFORMATION DECLARATION OF UNDERSTANDING & PRIVACY ACKNOWLEDGMENT

From 1 July 2004, Superannuation Portability regulations require the Trustee to obtain written confirmation that members, who wish to rollover their benefits into another fund, are aware that they may ask for information regarding the changes to their benefit entitlement which would result from the transfer.

To enable your withdrawal request to be actioned, if you are satisfied, please complete the following 'Declaration of Understanding,' If you do not feel you are in a position to sign the declaration please speak to your financial adviser or contact our Client Service Line on 1300 137 909 between 9am and 5.00pm (EST) Monday to Friday or email service@lifefocusonline.com.au and we will be happy to assist in answering your questions.

'I am aware that I may ask for any information that I reasonably require for the purpose of understanding the effects on my benefit entitlement prior to rolling over my benefits. This includes information on fees, charges, effect on insurance cover (if applicable) and any other matter that I may require.

I declare that I require no such information and wish to transfer my benefits according to my instructions'.

I acknowledge that the Trustee is bound by the *Privacy Amendment (Private Sector) Act 2000* and that this information is being collected for purposes, use and disclosure only in accordance with the Act as reflected in the Trustee's Privacy Policies and Procedures.

Member Signature

Date Signed (dd/mm/yyyy)

ON COMPLETION PLEASE FORWARD TO:

LifeFocus Superannuation Fund
PO Box 1282
ALBURY NSW 2640

LIST OF PEOPLE AUTHORISED TO CERTIFY DOCUMENTS

In certain circumstances the Trustee may request that you provide 'Certified Documents'. These are copies of important documents which need to be certified as true copies of the originals by a person authorised to do so.

Who can certify copies for you?

- A person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as 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 an 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*)
- A finance company officer with 2 or more continuous years of service with one or more finance companies (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

How should the authorised officer certify each document?

They must write 'This is a true copy of the original document sighted by me'. Sign, and print the following details: Name, Address, Business hours telephone number, Profession or Occupation or Organisation and the Date certified. They must include the official stamp or seal of the certifier's organisation on the copy if the organisation has such a stamp.

In addition to the above, a Justice of the Peace must also print their registration number and the state in which they are registered as a Justice of the Peace.

Documents not verified or not verified correctly

The Trustee is not permitted to process:

- Documents that have been certified by an immediate relative or a person residing at the same address as the applicant
- Documents that are photocopies that have not been certified
- Documents that have not been correctly certified
- Documents certified by a Justice of the Peace without a registration number

Should the Trustee receive documents which are not verified, or verified incorrectly, they may be returned to you to be correctly certified. Your request will not be processed until such a time as the appropriate documentation is received.