

Early Release of Super

On compassionate grounds



Only complete this form once your application for release of your super benefit on compassionate grounds has been approved by the ATO.

RED SECTIONS FOR YOUR INFORMATION

GREY SECTIONS TO FILL OUT

Before you start

- Read the Important Information section at the end of this form
- Prior to completing this form, you must have:
 - met a number of conditions specified by the Australian Taxation Office (ATO)
 - applied for and received ATO approval for the release of your super on compassionate grounds
- The amount you receive will be less any tax and charges payable on the benefit payment
- If the ATO approves the early release of your super, use this form to advise TelstraSuper of your payment details
- You must also provide TelstraSuper with a copy of your ATO approval letter for release on compassionate grounds
- If you withdraw your full account balance, your account will be closed and any insurance cover you have through this account will cease
- If you are making a partial withdrawal, you should consider whether your withdrawal will affect your insurance cover including whether it will result in cessation of your insurance. Please contact us for further information
- If you're signing this form on behalf of another person, you will need to complete and attach an **Authorised Third Party Representative Identification** form available at telstrasuper.com.au/forms and include any certified documents as required.

1. Your details currently held by TelstraSuper

Title	Mr	Mrs	Miss	Ms	Other
Surname*			Given name(s)*		
Member number*		Account number*		Date of birth*	
Residential address* (PO Box not acceptable)					
Suburb*		State*		Postcode*	
Mobile/contact no.*		Email*			

*Mandatory fields

Note: We'll be unable to process this form if your contact or personal details are different to the details we currently hold for you. To check and/or update your details before you submit this form you can:

- log into your SuperOnline account, or
- call us on **1300 033 166**, or
- complete a **Change of contact details** form to update your contact details or a **Change of member details** form to update your personal details available at telstrasuper.com.au/forms and submit it with this form.

YOUR
BASIC
INFO



Before you act

You may wish to consult an adviser before you make any decisions relating to your financial affairs. To speak with an adviser from TelstraSuper Financial Planning call **1300 033 166**.

PAY
INTO
↓

2. Payment details

Payments can only be made to an Australian bank, credit union or building society account that is in your name or in a joint account. Payments cannot be made to credit cards.

Note: You must provide a copy of a current bank statement (within the last 6 months) showing your address, the bank account details including the name the bank account is held in and the BSB and account numbers. Online transaction listings are not acceptable.

Name of financial institution

Branch name

Account name

BSB no.

Account no.

Note: TelstraSuper does not accept responsibility for any delay or loss of interest caused by providing incorrect details on this form. TelstraSuper is discharged from all liability once your benefits are paid into your nominated account in accordance with your instructions.

ARE
YOU A
PEP?
↓

3. Politically Exposed Person

Are you a Politically Exposed Person (PEP)? See the Important Information section for the definition of a PEP.

Yes No

If yes, please tick which PEP category applies to you:

- a) I hold a prominent public position or function in a government body or an international organisation
- b) I am an immediate family member of a person referred to in (a) above,
and that person's name is _____ and public position is _____
- c) I am a close associate of a person referred to in (a) above,
and that person's name is _____ and public position is _____

4. Proof of identity

Proof of your identity and the identity of any attorney, administrator or guardian who signs this form on your behalf must be supplied **every time** an early release of super request is made. This can be done in one of two ways:

Option 1 – Electronic ID verification

By providing details of any **TWO** of the following identity documents – your Medicare card, pension card, Australian drivers licence, Australian passport – you agree to TelstraSuper using this information to verify your identity electronically using independent data sources.

I acknowledge that my personal information will be sent to TelstraSuper's external identity verification provider to verify my identity for the purposes of this early release of super request, and consent to that being done.

Important: Make sure the details you provide are accurate. If the personal details you provide in **section 1** do not match the electronic identification details you provide below, we will not be able to use these details to prove your identity. This will delay processing your request as we may require you to provide us with certified proof of identity documents.

Medicare:

Full name (including initials as shown on your Medicare card)

Medicare 10 digit number	Expiry date mm/yyyy	Your reference number (the number beside your name)
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Pension card:

Card type	Health Care Card	Seniors Health Card	Pensioner Concession Card
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Full name (as shown on card)

CRN	–	–	Expiry date dd/mm/yyyy
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Australian drivers licence:

Full name (as shown on your licence)

Australian drivers licence number	Expiry date mm/yyyy	State of issue
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Card number

Contact your licence provider if unsure of your card number

Australian passport:

First name (including middle name as shown on your passport)

Surname (as shown on your passport)

Australian passport number	Expiry date mm/yyyy
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Place of birth (as shown on your passport)

Option 2 – Certified document ID verification

See the Important Information section to understand the documents we can accept and how to get your proof of identity documents certified. Please note we may use these documents for the purpose of undertaking electronic data verification using independent data sources in the event your proof of identity documents have not been correctly certified.

I have attached a certified copy of **one photographic** proof of identity document

OR

I have attached certified copies of **two non-photographic** proof of identity documents.

5. Your signature and declaration

By signing this form, I:

- request the payment of my super benefit as detailed in this form and authorise TelstraSuper to give effect to this
- acknowledge that I have read and understood the Important Information section of this form
- acknowledge that all the information I have provided on this form is true and correct
- understand that payment of this withdrawal will only be made into a bank account in my name or in a joint name
- understand that, if I have insurance cover, it will cease if I don't have enough funds remaining in my super account to pay for any premiums that I am responsible for
- understand that if I don't provide my Tax File Number additional tax may be payable on my withdrawal
- understand tax may be deducted from my withdrawal if I'm under age 60
- consent to TelstraSuper verifying my identification via electronic means using independent data sources and in the event my certified documents (if applicable) have not been correctly certified
- understand that, if the details on the form differ from the details that TelstraSuper holds about me, my form will not be processed and TelstraSuper will not be responsible for delays or other consequences due to the details not matching.

Each person who signs this form as a guardian, administrator or attorney for the member named in this form represents and warrants by signing this form that he or she has been lawfully appointed as guardian, administrator or attorney (as the case may be) for that member and that appointment remains valid and current at the date hereof and has not been revoked.

SIGN
↓

Name

Signature

X

Date

If the signatory is not the member, please state your capacity:

Guardian

Administrator

Attorney



Please return completed form to TelstraSuper:

PO Box 14309, MELBOURNE VIC 8001 or email to contact@telstrasuper.com.au

Before sending this form to TelstraSuper, please check that you have:

- ☒ read and completed the form in its entirety, including the Important Information section
- ☒ provided a copy of your ATO approval letter for release on compassionate grounds
- ☒ provided a copy of your bank account statement
- ☒ provided details of two proof of identity documents or certified copies of your proof of identity documents
- ☒ photocopied your completed application form for your records.



Eligibility for early release of your super on compassionate grounds

To access your super on compassionate grounds you must meet the conditions specified by the Australian Taxation Office (ATO). Benefits in a transition to retirement income stream cannot be accessed on compassionate grounds.

You must apply to the ATO first

The ATO is responsible for assessing all requests for the early release of super benefits on specified compassionate grounds. TelstraSuper is responsible for paying the benefit from the fund.

The conditions you need to meet

A number of conditions must be met before super can be released on compassionate grounds. You must:

- be an Australian or New Zealand citizen or permanent resident
- need money on compassionate grounds
- have no way to pay other than by accessing your super.

Generally, compassionate grounds are:

- Mortgage: to stop the bank from selling your home
- Medical: to pay for treatment or travel to treatment
- Disability: to modify your home or car
- Palliative care: for you or a dependant
- Funeral: for a dependant

For more information and to apply for early release of your super on compassionate grounds visit the ATO website www.ato.gov.au

Definition of a Politically Exposed Person (PEP)

Politically Exposed Person or PEP means an individual:

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| <p>(a) who holds a prominent public position or function in a government body or an international organisation,¹ including:</p> <ul style="list-style-type: none">(i) Head of State or head of a country or government; or(ii) government minister or equivalent senior politician; or(iii) senior government official; or(iv) Judge of the High Court of Australia, the Federal Court of Australia or a Supreme Court of a State or Territory, or a Judge of a court of equivalent seniority in a foreign country or international organisation; or(v) governor of a central bank or any other position that has comparable influence to the Governor of the Reserve Bank of Australia; or(vi) senior foreign representative, ambassador, or high commissioner; or(vii) high-ranking member of the armed forces; or(viii) Board chair, chief executive, or chief financial officer of, or any other position that has comparable influence in, any State enterprise or international organisation; or | <p>(b) who is an immediate family member of a person referred to in paragraph (a), including:</p> <ul style="list-style-type: none">(i) a spouse; or(ii) a de facto partner; or(iii) a child, a child's spouse or de facto partner; or(iv) a parent; or <p>(c) who is a close associate of a person referred to in paragraph (a), which means any individual who is known (having regard to information that is public or readily available) to have:</p> <ul style="list-style-type: none">(i) joint beneficial ownership² of a legal entity or legal arrangement with a person referred to in paragraph (a); or(ii) sole beneficial ownership² of a legal entity or legal arrangement that is known to exist for the benefit of a person referred to in paragraph (a). |
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1. International organisation essentially means an organisation established by a formal political agreement by two or more countries which has the status of an international treaty.

2. Beneficial ownership means directly or indirectly owning 25% or more of an entity or exercising operational or financial control over an entity.



Proof of Identity Guide

Your application cannot be processed until acceptable proof of identity documents have been provided to us as required by law when submitting an **Early Release of Super on compassionate grounds** form.

Proof of your identity and the identity of any attorney, administrator or guardian who signs this form on your behalf must be supplied every time a withdrawal request is made. This can be done in one of two ways:

1. Electronic ID verification

Supply details of any **TWO** of the following identity documents: Medicare card, pension card, Australian drivers licence or Australian passport, and you consent for TelstraSuper to verify your identity electronically using independent data sources.

OR

2. Certified proof of identity documents

Supply a certified copy of one acceptable photographic ID document or two non-photographic ID documents.

Acceptable photographic ID (one document required)

Certified copy of one of the following documents:

- current Australian driver's licence or permit that contains your photograph
- current passport
- current Proof of Age card containing your photograph
- national identity card containing your photograph and signature.

Acceptable non-photographic ID (two documents required)

Certified copy of one of the following documents:

- Medicare card
- birth certificate
- a citizenship certificate issued by the Commonwealth or a foreign government
- low income health care card or Commonwealth seniors health card or Pensioner Concession Card

AND

Certified copy of one of the following documents containing your name and current residential address:

- a council rates notice (less than 3 months old)
- gas, water or electricity bill (less than 3 months old)
- a notice of assessment from the ATO (less than 12 months old)

A complete list of acceptable identification is available on our website at telstrasuper.com.au/proofofid

Signing a document on behalf of another person

You must complete and attach an **Authorised Third Party Representative Identification** form including a certified copy of the document by which you are authorised to sign on behalf of another person:

- power of attorney document
- guardianship order
- administration order.

For a copy of an **Authorised Third Party Representative Identification** form go to telstrasuper.com.au/forms

How to get your proof of identity documents certified

- Photocopy your identity documents (if you're using your driver's licence, photocopy both sides)
- Take the photocopies and the original documents to a person authorised to certify proof of identity documents:
 - If living in Australia: This includes pharmacists, police officers or a Justice of the Peace.
 - If living overseas: This must be a person who is an Australian Consular Officer or a foreign notary public.

For a complete list of people authorised to certify proof of identity documents in Australia and overseas visit telstrasuper.com.au/proofofid

To certify your documents, the authorised person must:

- sight the original and the copy
- confirm that the documents are identical
- write or stamp on the photocopy:
 - 'I certify that this is a true and correct copy of the original document I have sighted', and
 - their name, qualification, business address, and registration number (if applicable), and
 - their signature and date on all pages of the photocopy.

You must keep the original proof of identity documents and send the certified copy of your proof of identity documents to us.

Example



I certify that this is a true and correct copy of the original document I have sighted.

J. Sample

Joan Sample
11 Same St, SOMETOWN VIC 3009

Justice of the Peace
Reg no: 26587
1 March 2020