

# Condition of release notification



Please complete this form when you have met a condition of release.

## RED SECTIONS FOR YOUR INFORMATION

## GREY SECTIONS TO FILL OUT

### Before you start

Read the current **TelstraSuper RetireAccess Product Disclosure Statement (PDS)** available at [telstrasuper.com.au/pds](https://telstrasuper.com.au/pds)

You don't need to complete this form if you have turned 65 as you will have automatically satisfied a condition of release.

By notifying us that you've met a condition of release:

- your benefits will be reclassified as unrestricted non-preserved benefits in your accumulation account(s)
- your Transition to Retirement (TTR) income stream(s) (if applicable) will change to a Retirement income stream, and as a result:
  - investment earnings will be tax-free
  - you'll be subject to a transfer balance cap, which is the total amount you can transfer to a tax-free income stream. Every individual will have their own personal transfer balance cap and will depend on your circumstances. This cap amount includes your Retirement income stream with TelstraSuper in addition to any amounts you may have in tax-free income streams with other super funds. If you exceed the cap, the Australian Taxation Office (ATO) will issue you an Excess Transfer Balance determination requesting you to transfer the excess amount from your Retirement income stream. For more information refer to the ATO website at [www.ato.gov.au](http://www.ato.gov.au)
  - if you've been receiving the maximum income payment, this will convert to a fixed dollar amount
  - minimum withdrawal amounts will continue to apply
- you may be eligible to receive the Retirement Bonus. For more information about eligibility, limits and repayment rules visit [telstrasuper.com.au/bonus](https://telstrasuper.com.au/bonus)
- your investments in the Growth, Balanced, Moderate, or Conservative options, will be transferred to the equivalent Lifestyle investment option. For more information visit [telstrasuper.com.au/lifestyleoptions](https://telstrasuper.com.au/lifestyleoptions)

If you are signing this form on behalf of another person, you will need to provide identification in the member's name and attach an **Authorised Third Party Representative Identification** form available at [telstrasuper.com.au/forms](https://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\*

Member number\*

Given name(s)\*

Date of birth\*

Residential address\* (PO Box not acceptable)

Suburb\*

State\*

Postcode\*

Mobile/contact no.\*

Email\*

\* Mandatory fields

**Note:** If you're a current member 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](https://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**.

## 2. Condition of release

You must select which condition of release you have met.

I have reached preservation age and permanently retired from the workforce and declare that I never intend to become gainfully employed for 10 hours or more a week.

OR

I have ceased an employment arrangement on or after the age of 60

OR

I am no longer in paid employment due to permanent incapacity\*

OR

I have a terminal illness\*

Any contributions or investment earnings on any accumulation account **that are earned after meeting this condition of release**, will be preserved unless you satisfy a condition of release at the relevant time.

\*The Trustee will require supporting evidence as to your medical condition resulting in permanent incapacity or terminal illness.

The preservation age applicable to you depends on your date of birth:

Date of Birth	Preservation Age
Before 1 July 1960	55
1 July 1960 – 30 June 1961	56
1 July 1961 – 30 June 1962	57
1 July 1962 – 30 June 1963	58
1 July 1963 – 30 June 1964	59
After 30 June 1964	60

## 3. Your declaration and signature

By signing this declaration, I confirm that the information provided on this form is true and correct.

I acknowledge that I have read the Privacy Policy and Privacy Collection Statement and I understand and consent to how TelstraSuper will use my personal information.

Each person who signs this form on behalf of the applicant named in this form:

- represents and warrants that they are lawfully appointed as guardian, administrator or attorney (as applicable), and
- declares that they are acting in accordance with the terms of the relevant power of attorney, guardianship order or administration order, including that if more than one person must act under the appointing document, all nominated persons must include their name, signature and date on this form below, and
- declares that their appointment remains valid and current as at the date of this form.

State your capacity (if applicable):      Guardian      Administrator      Attorney

Name

Signature

X

Date



**Please upload completed form via your SuperOnline account or return it to:**

PO Box 14309, MELBOURNE VIC 8001

### Instructions for completing this form

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

- ☒ read and completed the form in its entirety.

Telstra Super Pty Ltd, ABN 86 007 422 522, AFSL 236709 is the trustee of the Telstra Superannuation Scheme ABN 85 502 108 833 (TelstraSuper).  
Telephone 1300 033 166 Website [telstrasuper.com.au](http://telstrasuper.com.au)

Telstra Super Pty Ltd complies with the Privacy Act 1988 (Cth). For further information on privacy visit our website at [telstrasuper.com.au](http://telstrasuper.com.au) to download a copy of our Privacy Policy and Privacy Collection Statement.

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