



Age Retirement

Benefit Application Form & Information Leaflet

Before completing this benefit application form, you are advised to read the **CSS Product Disclosure Statement** at www.css.gov.au or call 1300 000 277.

The Explanatory Notes form part of the benefit application and both parts should be provided to members.

The attached benefit application form and explanatory notes are to be used by members of the Commonwealth Superannuation Scheme (CSS) who are voluntarily retiring or who are dismissed having reached their minimum retiring age (generally age 55).

Do not complete this form if you are:

- > A member who has been involuntarily retired or who has accepted an offer of retrenchment or redundancy from your employer. Instead, refer to the form '**Involuntary Retirement (SRR1-CSS)**'.
- > A member who has ceased Scheme membership due to the sale, transfer, or outsourcing of an organisation, business, service, asset or function, and who has accepted an offer of continuing employment with the purchaser, transferee, or provider. Instead, use form '**Sale of Asset Benefits (SRR3-CSS)**'.
- > A member who is under minimum retiring age (generally age 55). Instead, refer to form '**Cessation of Employment (SR1-CSS)**'.
- > a member who has not ceased employment with the employer to which your CSS membership relates (i.e. you have ceased scheme membership because you have joined another employer-sponsored superannuation scheme or you have changed your employment conditions so that you are no longer eligible to remain a CSS member). Instead, you should complete a **Cessation of CSS Scheme Membership form (SR2-CSS)**.

See your Personnel Section if you fit into one of these categories.

Applications should be made within 90 days of retirement date to be effective.

Read this first!

Before completing this benefit application form, you are advised to read the **CSS Product Disclosure Statement** at www.css.gov.au or call 1300 000 277.

These explanatory notes are intended to assist you to complete the attached benefit application form. They are not intended to provide a detailed explanation of your benefit options.

It is suggested that you separate the notes from the form (if joined) so that you can refer to them as you complete the application form.

Where can you find out more about your benefit entitlements?

There are many CSS publications that explain the various benefit options which are available to you.

Detailed information on your options can be found on the CSS Website, www.css.gov.au. There is a fact sheet on *Tax and Your CSS Benefit* which you should read, it can be downloaded from the CSS website.

Other sources of information include the following:

- > Our Contact Centre can provide details of your benefit entitlement, explain the benefit options and provide information on the value of your prospective benefits. For more information:
Telephone: 1300 000 277
Facsimile: 02 6272 9612 or
Email: members@css.gov.au
- > An estimate of the potential value of your benefit options is also available from Member Services Online section of the CSS website at: www.css.gov.au
- > It is in your interest to seek professional advice before you make a decision on a benefit. We cannot provide you with financial advice.

See also *Section C – Information Acknowledgment*, to complete an acknowledgment that you have received sufficient information to make an informed decision about how you would like your benefit paid.

Forms you need to complete when you cease CSS membership

- > the attached Benefit Application form;
- > if you elect to receive a pension as your benefit, you will need a *Tax File Number Declaration* form obtainable from the Australian Taxation Office (ATO), your Personnel Section, or designated newsagents that distribute ATO forms.

Compulsorily preserved amounts

The Superannuation Industry (Supervision) Regulations (SIS) and the CSS legislation place some restrictions on the amount of cash lump sum that can be paid to members who are not retiring from the workforce (*see section B for the definition of retiring from the workforce*).

If you are less than age 65 and have not retired from the workforce any productivity component paid to you as a lump sum must be rolled over.

In addition, if you are under age 60 and have not retired from the workforce, any member component paid as cash lump sum will be limited to the amount you are allowed under the SIS legislation. This is the cash amount you would have received if you had been involuntarily retired on 1 July 1999 and is referred to as the **SIS Upper Limit**.

The Benefit Application form

Your accurate completion of the Benefit Application form allows us to process the application as soon as possible after the date of your retirement. Take care when completing this form. If you do not complete the Benefit Application form correctly, the processing of your benefit will be delayed, or may be paid incorrectly.

Section A – Personal details

Please complete all the boxes in this Section. It enables us to identify you and any other potential beneficiary, and tells us where we can contact you.

Relationship details

Details of your relationship status, including same sex or opposite sex de facto relationships, should be provided. You may wish to include a copy of your marriage certificate or registered relationship certificate with your application. This would speed up the process in the event that a spouse's benefit becomes payable.

For the definition of a spouse for death benefits see the **Death benefits** fact sheet at www.css.gov.au

Contact details

The postal address you provide is where all correspondence will be sent.

Contact phone numbers are also required, in case we need to contact you regarding the payment of your benefit. Your current work number is useful if you submit your application form before the date of exit, as this will allow us to check information with you quickly.

If you have email access, either at work or at home, inclusion of your current email address will be helpful.

Section B – Employment details

You must sign the Employment Status Declaration in all cases, including providing details of who you will be continuing in employment with, if applicable.

If you are continuing in employment with the same employer to which your CSS membership relates, you should not complete this form; you should complete a *Cessation of CSS Scheme Membership (SR2-CSS)* form. Please call 1300 000 277 for further information.

Note: There are penalties for making false declarations in respect of benefit claims.

‘Retiring from the workforce’

Members who are ‘*gainfully employed*’ within the meaning of the *Superannuation Industry (Supervision) Act 1993* [SIS Act] for at least 10 hours per week, are taken as having remained in the workforce.

Re-employment

If you have been offered or made arrangements for re-employment in a full-time or part-time capacity with another Department, Authority or Instrumentality being an ‘*approved authority*’ for the purposes of the *Superannuation Act 1976*, you may not be entitled to claim your CSS benefit at this time.

You should contact us on 1300 000 277 for advice **before** completing this section if you are unsure of the approved authority status of your prospective employer.

About your former employment

Please provide the name of your former employing department, agency or organisation.

Section C – Information acknowledgment

Please complete this acknowledgment that you have received and understood sufficient information to be able to make an informed choice of how you would like your benefit paid and that you have been advised to read the **CSS Product Disclosure Statement** before completing this form.

You are making a formal election under the provisions of the *Superannuation Act 1976*. This election is binding and cannot normally be changed, although ARIA may, at its absolute discretion, agree to cancel an election in certain circumstances.

Information sources are shown at the start of these explanatory notes and it is **strongly recommended** that you make use of them **before** proceeding to complete this application form.

You should also note that, if your benefit has been paid and you then change your mind about the payment arrangements, a fee will be charged by us for the re-issuing of the payment.

Section D – Benefit options

This section contains the benefit options that are available to CSS members who are eligible to receive an age retirement benefit. The option selected requires a signed election by the applicant for the benefit choice to be valid. **Only make one choice**, otherwise your benefit application will be invalid and payment will be delayed.

Your benefit may also be subject to deduction of any outstanding superannuation contributions surcharge debt at the date of determination. (*See Section for surcharge for more information.*)

Benefit option elections should be completed within 90 days of your retirement date.

If your election is made outside the time allowed, you must provide reasons with your application as to why the election was not made within the period allowed.

Option 1 – Maximum Pension, No Lump Sum

This option provides you with a standard CPI indexed pension together with an additional non-indexed pension purchased with your member and productivity components.

Option 2 – Maximum Pension, Refund of Productivity Component

This option provides you with a standard CPI indexed pension together with an additional non-indexed pension purchased with your member component only. If you have not left the workforce and are under age 60, your productivity benefit must be rolled over.

If your productivity benefit is to be rolled over you must provide us with the name of your rollover fund in Section G1.

Option 3 – Standard CPI Indexed Pension and Lump Sum

This option provides you with a standard CPI indexed pension plus a lump sum of your member and productivity components. If you have not left the workforce and are under age 60, your productivity benefit must be rolled over.

If your productivity benefit is to be rolled over you must provide us with the name of your rollover fund in Section G1.

Option 4 – Postpone all Benefits (only available if you have not left the workforce)

You may elect to postpone the receipt of all of your CSS age retirement benefit until a future date.

You can then claim your postponed benefit at any time provided you have left the workforce. The benefit must, however, be paid when you reach age 65.

The benefit will be paid with effect from the date that you provide us with written advice that you have left the workforce.

The postponed benefit paid at that time will be a standard CPI indexed pension plus either;

- > a lump sum of your member and productivity components
- or
- > additional non indexed pension purchased with your member and productivity components; or
- > additional non-indexed pension purchased with your member component and a lump sum of your productivity component.

Option 5 – Postpone the receipt of your standard CPI indexed pension and productivity component and claim your member component (only available if you have not left the workforce)

You may elect to postpone the receipt of your standard CPI indexed pension and productivity component to a future date and take your member component now as either:

- > a lump sum; or
- > additional non indexed pension

You can then claim your postponed standard CPI indexed pension benefit at any time provided you have left the workforce. The benefit must, however, be paid when you reach age 65.

The pension benefit will be paid with effect from the date that you provide us with written advice that you have left the workforce.

Option 6 – Lump Sum Only, No Pension

This option is only available to former Provident Account members who have reached age 60. The election provides you with a lump sum calculated on the basis of three times your accumulated basic contributions and Fund earnings, plus any supplementary contributions and your productivity component.

The productivity benefit must be rolled over if you have not left the workforce.

If the productivity benefit is to be rolled over you must provide us with the name of your rollover fund in Section G1.

Section E – Election for reduced initial pension benefit in return for increased spouse and/or children’s pension benefit

This section only applies to you if you are claiming all or some of your benefit as a pension (ie benefit options 1, 2 or 3).

The *Superannuation Act 1976* gives contributing and deferred or postponed benefit members a choice of rate for the reversionary pension payable on death.

If you elect to take all or part of your benefit as a pension then, should a spouse’s pension become payable, your spouse will be entitled to 67% of your pension entitlement at date of death.

You may, however, elect to receive a reduced pension now in return for your spouse receiving an increased pension should a spouse’s pension become payable.

If you elect for the reduced pension, your pension will be reduced to 93% of that payable had you not elected for this option. In return, an eligible spouse would be entitled to a pension of 85% of your reduced pension benefit.

Benefits to eligible children/orphans would also be increased under this option.

You need to complete this section to therefore advise us that you either;

- a) do not wish to take a reduced pension of 93% of your initial pension entitlement; or
- b) elect to take a reduced pension of 93% of your initial pension entitlement.

You should ensure that you are fully aware of the future implications in relation to this choice. In particular, you should be aware that you cannot change your choice should your situation change in relation to your spouse and/or children after your election is made.

If you need more information before making your choice, you can contact our Contact Centre for further details.

Section F – Superannuation contributions surcharge

A superannuation surcharge is payable by members whose adjusted taxable income (taxable income plus the value of employer contributions to their superannuation) exceeded certain levels before 1 July 2005. Also members who had declined to provide their tax file number (TFN) for superannuation purposes may have had surcharge assessed.

The surcharge was abolished from 1 July 2005, however any existing liabilities prior to this date must still be met.

If you had a surcharge debt advised to you by either the ATO or CSS, and you have not paid off the debt, your benefit will have been adjusted. This debt will be actioned as per your benefit application.

If the ATO advises you of a surcharge liability after the date you take your benefit, you should pay the debt direct to the ATO.

Section G – Benefit payment arrangements

This section allows you to nominate how your lump sum will be paid.

All rollovers must be made to a complying superannuation fund, rollover fund, Retirement Savings Account (RSA), or be used to purchase an annuity.

CSS will not deduct tax from any amount rolled over to a rollover fund. However the untaxed components of the lump sum will be taxed at 15% by the receiving fund. This will alter the nature of the amount from 'untaxed' to 'taxed'.

A higher rate of tax will apply to transfers over \$1.1 million from an untaxed scheme to a taxed scheme.

Taxation legislation provides that, once an amount has been paid to you or deposited in your bank account, it cannot be subsequently rolled over.

Lump Sum Payments

G1 – Rollover fund or RSA for the compulsorily preserved component of your lump sum benefit

If you have a compulsorily preserved component in your lump sum, this is where you nominate a rollover fund to receive that amount. You **MUST** complete this section if you have elected to receive a lump sum of your productivity component or a lump sum only benefit (Section D – Options 2, 3 or 6) and you have not left the workforce. (See also Section B for the appropriate definition.)

When completing this section you should include sufficient information, such as the name and Australian Business Number (ABN) to enable us to identify the rollover fund or RSA. You must also provide your Membership Number for the rollover fund or RSA or, if you have not yet been issued with a Membership Number, a Superannuation Product Identification Number (SPIN). These details can be

obtained from the rollover fund or RSA concerned. Failure to provide these details will result in delays in the payment of your benefit.

G2 – Lump sum cash payment

This section allows you to advise what portion of your lump sum is to be paid in cash. You are able to select a gross dollar amount, a percentage of the lump sum amount, or if you have selected a rollover in sections G1 or G3, the balance of the lump sum benefit.

You also have to complete bank account details in sections G4 to G8, to advise us where the cash payment is to be made.

G3 – Rollover fund nominations

You can nominate two rollover funds or RSA's to receive all or part of your lump sum benefit. Complete one nomination if you are going to roll over your entire benefit to one fund. Complete both nominations to provide details of a second fund if you are going to split the amount.

All rollover cheques will be made payable to your nominated rollover fund(s) and, unless you specify otherwise, sent C/- you at your home address.

When completing this section you must include the name and Australian Business Number (ABN) for the nominated rollover fund or RSA. You must also provide your Membership Number for the rollover fund or RSA or, if you have not yet been issued with a Membership Number, a Superannuation Product Identification Number (SPIN). These details can be obtained from the rollover fund or RSA concerned. Failure to provide these details will result in delays in the payment of your benefit.

Can I request which part of the benefit to rollover first?

From 1 July 2007, proportioning rules require that your taxable and tax-free components be spread in equal proportions across those parts of the benefit payment you receive as cash or rollover.

Therefore, while you may request a certain order of payment or rollover, the payment will be subject to proportioning.

For further information on how your benefit is taxed it is recommended that you read the CSS fact sheet *Tax and Your CSS Benefit*.

Bank account details

Complete this section if you are electing to receive a cash lump sum or a pension as all or part of your benefit.

G6 – BSB Number

Please ensure that you include your financial institution's Bank and State Branch (BSB) code, otherwise your payment may be delayed. If you do not know the BSB code, ask your financial institution.

G7 – Account Number

Please ensure that you use a correct account number – note that it has a maximum of nine (9) digits and is not necessarily the same as your Automatic Teller Machine (ATM) access card number.

It is very important that these details are correct and legible, as incorrect BSB or account numbers can lead to payments going astray or being returned to us.

Return of payments from the banking system and reissue can take a minimum of two weeks to finalise.

G8 – Account Name

Benefit payments can only be made to an account that is in your name. The account can be in your name alone, or in joint names. If it is a joint account one of the names must be yours.

Section H – Taxation matters**H1 – Start Date for Taxation Purposes**

For taxation purposes, your lump sum benefit is called a Superannuation Lump Sum Payment.

The start date relates to the date your eligible service period (ESP) commenced and is used to calculate the various components of your Superannuation Lump Sum Payment for taxation purposes.

Generally, your ESP is the number of days between the date you commenced your current employment, (which may be earlier than the date you joined the CSS) and the date your payment is made. If your CSS membership commenced before 1 July 1983 and you have a Long Service Leave start date that is earlier than your CSS start date, that earlier date applies as your ESP start date. Earlier periods of employment for which you paid a transfer value into the CSS are added to your ESP. If this is the case, please fill in the start date of that earlier service.

If you do not show a date in this section, we will use the date on which you joined the CSS as your start date.

H2 – Your Tax File Number

In accordance with the *Taxation Laws Amendment (Tax File Numbers) Act 1988*, we are required to deduct PAYG tax at the top marginal rate plus the Medicare levy from benefits if a person does not provide a Tax File Number (TFN).

If you have not been issued a TFN you should lodge an *Australian Taxation Office Application/Enquiry* form with the Australian Tax Office (ATO). Forms are available at www.ato.gov.au or all ATO branches. You must provide proof of identity at the time you lodge the form.

H3 – Approval to advise your TFN to Rollover funds

We will provide your TFN to the receiving fund unless you instruct us not to. Please note that there are consequences for not supplying your TFN to a fund.

H4 – ‘Tax file number declaration’

If you have chosen to receive all or part of your benefit as a pension (Section D – Options 1, 2, 3 or Option 5 – additional non-indexed pension) and you wish to claim the tax free threshold and/or any available offsets and deductions against your pension benefit, you should complete this ATO Declaration form and attach it to your benefit application.

After retirement**Documents you may receive from us**

After you cease CSS membership, you will receive some documents associated with your entitlements. Depending on which benefit you choose, these documents may include:

- > a benefit payment letter, advising you of your benefit entitlement and when your payment will be made;
- > an ‘*Benefits Statement*’, in duplicate for each rollover nominated in Section F, which shows the breakup, for taxation purposes of each rollover you nominate;
- > a ‘*PAYG Payment Summary*’, in duplicate, for any lump sum cash payment paid to you;
- > a rollover payment cheque (or cheques), made payable to your nominated rollover fund(s);
- > a ‘*PAYG Payment Summary*’ and annual pension advice letter for any pension payments paid to you (which are sent to you in July each year if you are receiving a pension); and
- > an annual information statement if you chose to postpone your CSS benefit.

Do NOT lose these documents. They may be required to complete tax returns, lodge rollovers, or apply for Centrelink benefits, etc. It will take some time to issue replacements.

Rollover requirements

Rollover cheques are sent to you at the postal address you nominate on your Benefit Application form. **It is your responsibility to lodge them with the rollover fund with a copy of the Rollover Benefits Statement.**

Note: Do not send any rollover forms to us.

What next?

Do not send the completed application form direct to us.

When you have completed Sections A to G, you should give your Benefit Application form to your Personnel Section so that they can complete the Departmental Report and Checklist. Your Personnel Section will, in turn, forward your completed Benefit Application form to us.

Note: We cannot process the payment of your benefit until **after** the date of your exit but you may submit your application form before this date. This will allow us to check that all documentation and information have been provided well ahead of your exit.

You need to keep in mind, however, that benefit elections cannot be made more than 90 days before the actual date of retirement.

Remember, the sooner we get your correctly completed application form, the less likelihood there is of any delay in the processing of your benefit.

Privacy

ARIA and its administrator, ComSuper are collecting the information on this form for the following reasons:

- > to confirm your identity
- > to assess your eligibility for payment of the benefit
- > to pay your benefit
- > to contact you.

ARIA and ComSuper are committed to protecting any personal information we hold about you. Your information will not be used for any other purpose or disclosed to another party unless:

- > you authorise us to do so
- > the disclosure is authorised by law. This may include disclosing your personal information to other government agencies that have specific legislative authority to collect this information as required by policy and legislation. We will not disclose your personal information to the agencies unless it is lawful to do so.

Change of address

If you receive a pension or have a postponed benefit, it is very important that you advise us of any change in your postal address or your bank account details. This will enable us to forward information to you each year regarding your benefit.

Note: Postponed benefit members who fail to advise their change of address may be treated as *'lost members'*. This may ultimately result in their benefit being classed as *'unclaimed'* once they reach age 65 and transferred to the ATO.

All enquiries: 1300 000 277

Unclaimed benefits

If we do not receive a completed benefit application within 90 days after your retirement, your benefit may be treated as *'unclaimed'*.

If this happens and you do not make a late election, we may then pay your benefit as a maximum pension; i.e. you may lose your right to take any part of your benefit as a lump sum.

Alternatively, if you have made an election to receive a lump sum benefit but have not provided details of where the lump sum is to be paid, we may pay your lump sum benefit to the Eligible Rollover Fund (ERF) nominated by ARIA.

Any outstanding benefits will also be paid to the ERF in the following circumstances:

- > if you do not nominate a rollover fund in Section F1 to receive any compulsorily preserved components of your lump sum benefit; or
- > a rollover payment cheque is returned unclaimed or goes stale (e.g. not presented within 15 months of the issue date).

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Australian
Reward
Investment
Alliance

Age Retirement Benefit Application Form

Hints for using this form

- > Read the Explanatory Notes and each section of the form carefully before filling it in
- > Use Capital Letters and a blue or black pen
- > Sign your name where needed. If you don't sign the relevant sections of the form, it will be returned to you.

SECTION A - Personal details

Reference (AGS) number

DAY			MONTH			YEAR			

Cessation date

		/			/				
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Title (please tick one)

Mr
 Ms
 Mrs
 Miss
 Other

YOUR NAME

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Given name/s

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Your date of birth

		/			/				
DAY			MONTH			YEAR			

Previous memberships

Have you had any other periods of CSS membership? If so, please list the reference (AGS) number(s) for each of those memberships.

1										2									
3										4									

Relationship details

Married
 Single
 De facto

SPOUSE'S FULL NAME

Surname

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Given name/s

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Start date

of de facto relationship
(if applicable)

		/			/				
DAY			MONTH			YEAR			

Spouse's date of birth

		/			/				
DAY			MONTH			YEAR			

YOUR CONTACT DETAILS

Your residential address

STATE

POSTCODE

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Your postal address

STATE

POSTCODE

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Section A continued over page

SECTION C - Information acknowledgment

[Benefit processing may be delayed if this acknowledgment is NOT completed].

I have been given enough information to make an informed decision about how I would like my benefit to be paid and I have been advised to read the **CSS Product Disclosure Statement** before completing this form.

I also understand that, by choosing a benefit option in Section D, I am making a formal election under the provisions of the CSS legislation and this benefit election cannot be changed *except in certain circumstances approved by ARIA*.

SIGNATURE

DATE

DAY		MONTH		YEAR	

If you need more information, or would just like to talk about the options you have, please call us on 1300 000 277, facsimile (02) 6272 9612, or email members@css.gov.au.

You should also note that, if after your benefit has been paid, you wish to change your mind about the payment arrangements, a fee will be charged to re-issue the payment.

SECTION D - Benefit Options

PLEASE ENSURE THAT ONLY ONE BENEFIT OPTION IS COMPLETED

Your benefit option election must be completed within 90 days of your retirement date. If your election is made more than 90 days after your retirement date, you must provide reasons with your application as to why the election was not made within the period allowed.

Option 1–Maximum pension, no lump sum

I, ^{FULL NAME}

whose Reference (AGS) No. is ^{AGS NUMBER} elect to take my entire benefit as a pension.

SIGNATURE

DATE

DAY		MONTH		YEAR	

You have now completed this section. You must now go to **Section E** to tell us which spouse's pension option you want.

Option 2–maximum pension, refund of productivity component

I, ^{FULL NAME}

whose Reference (AGS) No. is ^{AGS NUMBER} elect to take my benefit as a maximum pension plus a refund of my productivity component.

SIGNATURE

DATE

DAY		MONTH		YEAR	

Note: If you have not left the workforce and are under age 60 your productivity component must be rolled over. You must provide us with the name of a Rollover Fund or Retirement Savings Account (RSA) for your productivity benefit in **Section G1**.

You have now completed this section. You must now go to **Section E** to tell us which spouse's pension option you want.

Options continued over page

Options continued

Option 3- standard CPI indexed pension and lump sum of member and productivity components (subject to proportioning)

I,

FULL NAME																								
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whose Reference (AGS) No. is

AGS NUMBER							
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elect to take my benefit as a standard CPI indexed pension plus a lump sum of my member and productivity components.

SIGNATURE

DATE

DAY	MONTH	YEAR
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Note: If you have not left the workforce and are under age 60, your productivity component must be rolled over. You must provide us with the name of a Rollover Fund or Retirement Savings Account (RSA) for your productivity benefit or your entire lump sum in **Section G1**.

You have now completed this section. You must now go to **Section E** to tell us which spouse's pension option you want.

Option 4-Postpone all benefits (only available if you have not left the workforce)

I,

FULL NAME																								
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whose Reference (AGS) No. is

AGS NUMBER							
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elect to postpone the receipt of all of my CSS benefit entitlements.

SIGNATURE

DATE

DAY	MONTH	YEAR
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

You have now completed this section. You must now go to **Section H-Taxation Matters**.

Option 5-postpone standard CPI indexed pension and productivity component and claim member component (subject to proportioning) (only available if you have not left the workforce)

I,

FULL NAME																								
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whose Reference (AGS) No. is

AGS NUMBER							
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elect to postpone the receipt of my CSS standard CPI indexed pension benefit and my productivity component and take my member component as either:

- an immediate lump sum; OR additional non-indexed pension.

SIGNATURE

DATE

DAY	MONTH	YEAR
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

You have now completed this section. You must now go to **Section E** to tell us which spouse's pension option you want.

Options continued over page

Section G continued

The amount you would like to be paid to this Rollover fund or RSA:

Either: A gross dollar amount: \$

Or A percentage: %

Or The balance of my lump sum benefit

Name of second nominated Fund or RSA

Australian Business Number (ABN) for Fund or RSA

PLUS

Membership Number for Fund or RSA

OR

Superannuation Product Identification Number (SPIN) for Fund or RSA

(These numbers can be obtained from the rollover fund or RSA concerned—refer to Section G3 of the Explanatory Notes for further details.)

The amount you would like to be paid to this Rollover fund or RSA:

Either: A gross dollar amount: \$

Or A percentage: %

Or The balance of my lump sum benefit

If you have specific instructions relating to which components of your benefit should be taken as a cash payment or rolled over (subject to proportioning), please attach these details separately

Additional details attached YES NO

You have now completed this sub-section. You must now go to Bank Account Details, to tell us where you would like your lump sum cash benefit and/or pension benefit paid.

Bank Account Details

Please provide the account details for the payment of any cash lump sum and/or pension.

G4. What is the Name of your Bank/Building Society/Credit Union?

G5. What is the Branch Address?

STATE

POSTCODE

Bank Account Details continued over page

Bank Account Details continued

G6. What is your Bank/Building Society/Credit Union State Branch Number (BSB No.)?

G7. What is your account number?

G8. My Account is in the name(s) of:

Note: If the BSB or account number you provide is incorrect the payment will not be accepted by your financial institution. If you have any doubts what your correct BSB or account number is, you should confirm these details with your financial institution before including them in this form.

You have now completed this section. You must now go to **Section H-Taxation Matters**, to tell us your taxation information.

SECTION H - Taxation matters

H1. What is your start date for taxation purposes?
(See Section H in the Explanatory Notes)

H2. Under the *Superannuation Industry (Supervision) Act 1993*, your superannuation fund is authorised to collect your TFN, which will only be used for lawful purposes.

These purposes may change in the future as a result of legislative change. We may disclose your TFN to another superannuation provider, when your benefits are being transferred, unless you request in writing that your TFN not be disclosed.

It is not an offence not to quote your TFN. However giving us your TFN will have the following advantages (which may not otherwise apply):

- > we will be able to accept all types of contributions (subject to scheme rules);
- > the tax on contributions to your superannuation account/s will not increase;
- > other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your superannuation benefits; and
- > it will make it much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

If you have already provided your TFN to us, you are under no obligation to provide it again in this application.

What is your Tax File Number?

H3. Select this box if you do not want us to pass on your TFN

Tax file number declaration

H4. Pension recipients should also obtain and complete a Tax File Number Declaration form (obtainable from the ATO or your Personnel Section) in order to claim any available tax offsets and deductions. Attach the completed Declaration to this application form.

Personnel Checklist

NOTE: Failure to provide the documents outlined in this checklist will result in delays in processing this application

The following information is required:

Yes N/A

- Applicant's signature and date of birth confirmed
- Superannuation history card or computer print-out attached
- Is the applicant receiving an allowance (or did they receive such an allowance in the past 3 years) that increases salary for superannuation purposes
- If YES, is the allowance automatically recognised as salary for superannuation purposes? If the allowance is not automatically recognised as salary for superannuation purposes please attach Form S17A, S17S or S17T.
- Has the member ever worked part-time hours? If YES-Please attach Form S542 or S551.
- Has the applicant had any periods of LWOP in the two years prior to date of exit? If YES-attach details of start and stop date(s), and type of leave.

Certification by Employer

I,

FULL NAME

being the officer authorised to sign on behalf of the Agency, declare that the above information is true and correct and certify that no variations to contributions will be made subsequent to the ceasing entry shown above.

SIGNATURE

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DATE

DAY	MONTH	YEAR
<input type="text"/>	<input type="text"/>	<input type="text"/>

Contact phone number

<input type="text"/>	<input type="text"/>
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Fax number

<input type="text"/>	<input type="text"/>
----------------------	----------------------

Email address

<input type="text"/>
<input type="text"/>

END FORM