

Use this form to apply for part or full payment of your benefit from the Fund.

Please read the following important information before you complete the form.

This form acts as an authority for the Fund to release your Prime Super benefit to you or an external superannuation fund.

You have the following options for your benefit payment:

- a partial or total rollover of your benefit (section 4) or
- a partial or total withdrawal of your benefit (section 5).

Please work through the form and complete all relevant sections. Use BLOCK letters and pen if you are completing a printed copy of this form. Any boxes should be marked with 'X'.

- You may ask us for the information that you reasonably require for the purposes of understanding any of your benefit entitlements. This includes information about any fees or tax that may apply because of a transfer or payment and the effect of this on your benefit entitlements in the Fund. Refer to your PDS for more information.
- You should note that we are able to refuse your partial benefit request if as a result you will have less than \$6,000 in your accumulation account. We are also able to refuse your request if you have made a similar transfer within the past 12 months.
- We will inform you in writing if we need further information to process your request or if we have to refuse your request.

Please attach any requested documentation.

Nearing retirement?

Do you know as a valued Prime Super member you have access to a consultation with one of our super specialists at no extra cost.

The decisions you make about your super could have a big impact on your retirement. Before you make a withdrawal from your super, you should speak to a super specialist. If you are close to retirement, we have income stream options so you can draw an income from your account and keep your money in a tax effective environment.

If you have any questions, call us on 1800 675 839.

The following gives you important information about when you can access your benefit.

Conditions of release

1. Rollovers to SMSFs

To rollover your account to an SMSF, you can do so via:

1. ATO online services

Note: You can only transfer the only whole balance this way.

2. the SMSF messaging provider and issue a rollover initiation request to Prime Super.

3. Complete this form and check your SMSF status on superfundlookup.gov.au, and if it is listed as Registered (*status not determined*) please supply the following additional documents:

- certified proof of identity;
- certified copy of your new Trustee letter from the ATO; and
- certified copy of your Trustee Declaration.

If you are rolling your benefit to an SMSF, you should be aware that SMSFs are subject to the same rules and restrictions as other funds, when benefits are to be paid out. In particular, benefits which are preserved in your Prime Super account remain 'preserved' in your SMSF, meaning they are not generally able to be accessed until you reach your 'preservation age' and retire. We may request further information from you about your status as a member and trustee (or a director of a corporate trustee) of your SMSF. Penalties may apply for providing false or misleading information. Please note that benefit payments payable to SMSFs are sent to the Fund's postal address that is registered with the ATO. All pages must be certified as a true copy of the original document on each page. The certification must include the certifier's signature, printed name, qualification (e.g. police officer), a contact number and the date. A certification must contain an original signature. For more information see the *Proof of identity requirements* fact sheet at primesuper.com.au/member/forms/factsheets/

2. Permanently departing Australia

The easiest way is to apply online at ato.gov.au/departaustralia – no paperwork required, you just need to provide a few personal details. From 1 July 2002 people who entered Australia on an eligible temporary resident visa and who later permanently leave Australia can claim any superannuation they have accumulated. New Zealand and Australian citizens will not be eligible for a Departing Australia Superannuation Payment (DASP), even if they were the holder of an eligible temporary resident visa.

For more information on how to access your superannuation when you permanently leave Australia, phone the ATO superannuation info line on 13 10 20 (within Australia) or email DASPmail@ato.gov.au (outside Australia).

1 Your personal details

Surname	Given names	Title	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Member number	Email ¹		
<input type="text"/>	<input type="text"/>		
Date of birth (DD/MM/YYYY)	Mobile number		
<input type="text"/>	<input type="text"/>		
Other/Previous names (if applicable)			
<input type="text"/>			
Residential address			
<input type="text"/>			
Town/Suburb/City	State	Postcode	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Employer	Employer phone number		
<input type="text"/>	<input type="text"/>		

¹ Please make sure the email address provided is your personal address as we may send information of a sensitive and personal nature to it.

2 Providing your Tax File Number (TFN)

We ask for your Tax File Number (TFN) when you join Prime Super, but you are not required by law to provide it. However, if you don't provide your TFN:

- we may not be able to accept all types of contributions to your account, and
- the highest marginal tax rate may be applied to your contributions and benefits.

If you provide your TFN it is easier to trace your super so you receive all your benefits when you retire.

The Trustee is authorised by law to collect your TFN under the Superannuation Industry (Supervision) Act 1993 (Cth) and to use it for lawful purposes.

We may disclose your TFN to another super fund, when your benefits are being transferred, unless you request otherwise in writing. Your TFN will otherwise remain confidential.

Insert your nine digit TFN here:

3 Provide proof of your identity

Superannuation funds are required by law to identify, monitor and mitigate the risk that the Fund is used for money laundering or financing terrorism. In order to comply with the law, we require all income stream applicants to provide proof of identity documents with their application. We cannot process your application if you do not provide these identification documents. You have two options: to provide electronic verification, or attach paper copies of certified documents.

Please complete option 1 or option 2.

Option 1 – Electronic verification

By providing my Medicare, Australian Driver Licence or Australian passport details below, I authorise the use of my personal details (including the information below) for the purpose of electronic data verification. I understand that my information will be subject to an information match request in relation to relevant official record holder information and a corresponding information match result will be provided via the use of third party systems.

Any **TWO** of the following documents:

1. Medicare card

Full name as appears on my Medicare card

My Medicare number is

Valid to

My reference number on this card

2. Driver Licence

Full name as appears on my Driver Licence

Licence number

State of Licence

Expiry date

Card number

3. Australian passport

My Australian passport number is

Full name as it appears on my Australian passport

Option 2 – I want to attach paper copies of certified documentation

All pages must be correctly certified as a true copy of the original document on each page.

The certification must include the certifier's signature, printed name, qualification (e.g. police officer), a contact number and the date. A certification must contain an original signature. To see an example of a certified document, refer to the end of this form. For more information about how to provide certified documents, see the *Proof of identity requirements* fact sheet at primesuper.com.au/member/publications/factsheets/

If my identification documentation has not been certified correctly, I authorise Prime Super to use the information from the documents in conjunction with the information on this form to verify my identify electronically using independent data sources.

Certification of personal documents

All copied pages of ORIGINAL proof of identification documents (including any linking documents) need to be certified as true copies by any individual approved to do so. The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (eg Justice of the Peace, Australia Post employee, Police Officer, Doctor, Pharmacist, Solicitor etc) and date. See Statutory Declarations Regulations 2023 for a full list of people who can certify your documents.

More information is also included in our Proof of identity requirements fact sheet at primesuper.com.au/member/publications/factsheets/ or you can call us on 1800 675 839 for more information.

4 Your payment instructions – Partial or total rollover to another fund or SMSF

Complete this section if you want to rollover some or all of your benefit to another fund.

Important note

If you have insurance cover in the Fund, such as Death (including terminal illness), Total and Permanent Disablement (TPD) and/or Income protection, it will cease on the date your full account balance is paid.

Type of payment

Please tick one of the following boxes to choose between a partial rollover or the rollover of the total amount of your benefit. Use this section to provide details of your new fund to receive your rollover.

Partial rollover

\$

Tick this box if you want to rollover part of your benefit to a different fund. You should note that we are able to refuse your partial benefit request if as a result you will have less than \$6,000 in your accumulation account. You can only make one partial rollover request in any 12 month period. Should you wish to make another payment in 12 months' time, then you will be required to complete a new form.

Total rollover

Tick this box if you want to terminate your membership with Prime Super and have your total benefit and future contributions paid to another super fund.

Details of your new fund to receive the partial or total rollover

Name of fund to receive your benefit (rollover fund)

ABN of rollover fund

USI of rollover fund*

Your member number in the rollover fund*

Contact phone number in the rollover fund

* You must provide a USI and membership number. We will not be able to process your benefit until you have provided this.

For Self Managed Super Funds (SMSFs)

You have two options available to transfer (rollover) your funds:

1. Complete an electronic application via myGov **OR**
2. Complete an electronic application through your SMSF Provider

To complete your request, we will also require a copy of your SMSF bank statement (must be the same bank details provided to the ATO) and it must include:

- bank logo,
- BSB code,
- account number, and
- name of the account holder (your SMSF).

Please refer to the acceptable bank statements guide at primesuper.com.au/bank-details

5 Your payment instructions – Partial or total withdrawal of benefit

I wish to withdraw

\$

of my benefit. This is a net amount after any tax (if applicable) has been deducted.

You should note that we are able to refuse your partial benefit request if as a result you will have less than \$6,000 in your accumulation account. You can nominate the investment option from which you want to withdraw your partial payment by completing section 6 of this form.

I wish to withdraw my full balance minus the minimum amount required to keep my account open.

I wish to withdraw my total benefit and I understand this will close my account.

Only unrestricted non-preserved benefits (where present) may be paid in cash, unless you have met a condition of release. Please tick ONE of the boxes below:

Reason for payment

Please tick one of the following boxes.

I have reached my preservation age and permanently retired

I am between age 60 and 64 and I have ceased an employment arrangement since turning 60

What date did you cease employment with your employment?

I wish to withdraw the unrestricted non-preserved component (where present) of my benefit

I have a low super balance (under \$200) and I have ceased employment with my current employer

I have reached age 65

If you are under age 60, your payment may comprise tax-free and taxable components. We will gross up the amount deducted from your account to cover any tax we are required to withhold in order to provide the net payment you have requested.

Cash payment details

EFT to an Australian bank account: Please complete this section if you would like your benefit paid directly to your bank account.

The nominated bank account must be in your name, or if it is a joint account, you must be one of the account holders. We can only make the payment into an Australian bank account.


If you do not have an Australian bank account, we will forward your payment via cheque. **Please attach a copy of your most recent bank statement.**

Name of Financial Institution

Account holder's full name

BSB

Account number

 **Please note:** Prime Super will only pay a lump sum withdrawal into an individual or joint bank account (which includes the member's name) at an Australian authorised deposit taking institution. Payment will not be paid to third party accounts (i.e. companies and business accounts).

6 Withdraw from your investment options

Please indicate which investment option(s) you would like to withdraw from. If you are choosing to withdraw from multiple investment options, please nominate the amount using whole numbers.

If you don't make a selection below, the funds will be drawn proportionately from the investment option(s) you are currently invested in.

Investment option

Pre-mixed options

MySuper (Balanced)	\$ <input type="text"/>
Managed Growth	\$ <input type="text"/>
Alternatives*	\$ <input type="text"/>
Income Focused**	\$ <input type="text"/>
Conservative	\$ <input type="text"/>

Sector options

Cash	\$ <input type="text"/>
Fixed Interest***	\$ <input type="text"/>
Property*	\$ <input type="text"/>
Australian Shares	\$ <input type="text"/>
International Shares	\$ <input type="text"/>

* If you would like to invest or remain in the Property and Alternatives investment options, you must have an account balance greater than \$10,000.

** Income Focused option will no longer be offered to accumulation members from 1 May 2026; if you are invested in Income Focused, the amount in this option will be transferred to Conservative, effective 23 May 2026.

*** Fixed Interest option will no longer be offered to members from 16 May 2026; if you are invested in Fixed Interest at that time, this amount will be transferred to the Cash option, effective 23 May 2026.

7 Your declarations

By signing this request form I am making the following statements:

- I declare I have fully read this form and the information completed is true and correct.
- I am aware I may ask Prime Super for information about any fees or charges that may apply, or any other information about the effect this payment or transfer may have on my benefits, and do not require any further information.
- If I have insurance cover in the Fund, I understand that such cover for Death (including terminal illness), TPD and/or Income Protection will cease for any event occurring on or after the date my full account balance is paid.
- I authorise my superannuation benefit to be paid as instructed on this form. Upon payment of my full account balance from Prime Super, I shall release Prime Super from all claims, liabilities and obligations whatsoever in respect of my interest in Prime Super. If the external superannuation fund I am transferring my benefits to is an SMSF, I confirm that I am a member and trustee (or director of a corporate trustee) of the SMSF.
- I understand that any contributions received by Prime Super subsequent to the payment/transfer of my benefit from the Fund will be allocated to a new account in my name, and that I will need to reapply for payment of these monies.
- I have not relied on any advice from the Trustee of Prime Super in making this request.
- I understand that the personal information collected is for purposes outlined in Prime Super's Privacy Statement. The information is only used for the purpose of administering fund membership or related purpose. Further information about privacy can be found in the *Prime Super Privacy Statement* at primesuper.com.au or by contacting the fund.
- I am an Australian citizen or a New Zealand citizen or permanent resident of Australia.

I authorise Prime Super to process my benefit in accordance with my instructions.

Full name

Member signature

Date

Checklist

Have you attached appropriate certified identification if you are not using electronic verification? (We cannot process these payments if we have not received appropriate certified ID).

Have you signed and dated the form?

Have you attached appropriate banking evidence? If you are applying for a payment to your SMSF, read section 4 and make sure you have attached the relevant banking details to make this payment to a SMSF.

Have you read – *Important information* and attached the additional documents required for your payment as specified in this section?

Have you completed all the relevant sections of this form?

Return this form to us via by mail or email

mail: Prime Super
Reply Paid 85860
PARRAMATTA NSW 2124
No stamp required

email: administration@primesuper.com.au
visit: primesuper.com.au
call: 1800 675 839

A Identification documents

Below is an example of how suitable identification documents should be certified.

If a name has changed in marriage for example, the appropriate linking documents must be provided

The licence must be current ie non-expired



An approved certifier must write or stamp:

Certified true copy

R Murray

**Mr Rob Murray
Police Officer
0412 345 678
11/3/2012**

Note: If address has changed, photocopy the reverse of the licence with a new address sticker featured, and ensure this is also certified.

All pages of all ID documents submitted must be certified.

Providing your card number

Adjacent is an example of where you can find your card number on your Driver Licence.

Card number



Note: Driver Licence are different for each state. If you are having trouble finding your card number, please contact us.