

Step 3: Provide payment instructions (continued)

- a copy of the SMSF bank account statement.

SMSF bank details

Name of financial institution

BSB

Account number

Account name

Telephone

Mobile

Fund ABN*

Unique Superannuation Identifier (USI)* / Electronic Service Address (SMSF only)

Membership or Policy number*

If exempt from an ABN, tick the reason for exemption:

Exempt Public Sector Super Scheme Retirement Savings Account

* A rollover to another fund cannot occur without the ABN, USI/ESA and Membership/Policy Number of the fund you are transferring to. If you are rolling over to an SMSF, you will also need to supply a copy of a bank statement of the Fund. If your rollover fund does not have an ABN you will need to contact the fund directly to request evidence of their complying status, such as their notice of compliance.

Step 4: Complete preservation declaration

A portion of your benefit may be subject to preservation. If the preserved portion of your benefit is over \$200, legislation requires that this amount be retained in an approved rollover fund until:

- You are at least 60 years of age and have ceased employment since attaining age 60;

OR

- You have reached your preservation age*, have ceased employment and have permanently retired# from the workforce.

* Your preservation age depends on your date of birth – see the table below:

Date of birth	Preservation age
Before 1 July 1960	55
1 July 1960 to 30 June 1961	56
1 July 1961 to 30 June 1962	57
1 July 1962 to 30 June 1963	58
1 July 1963 to 30 June 1964	59
1 July 1964 or after	60

Permanently retired is defined as never being gainfully employed again for more than 10 hours per week. Gainful employment means employed or self-employed for gain or reward in any business, trade, profession, calling, occupation or employment.

If you are eligible, please complete one of the following declarations to allow your benefit payment to be processed.

(select an option)

Yes, I have reached preservation age*, ceased employment and permanently retired from the workforce.

Yes, I am at least 60 years of age and I have ceased employment since attaining age 60.

Step 5: Completing proof of identity

You will need to provide certified proof of your identity. The easiest way to do this is as follows:

- photocopy both sides of your current driver's licence or passport
- take the photocopies to Australia Post or your local Police station
- ask them to certify your ID.

The person certifying your ID documents will include the following details on the copy(ies):

	←	A clear copy of the document that identifies you (i.e. your driver's licence (front and back) or passport)
IDENTIFICATION	←	Write or stamp 'certified true copy' of the original document
Certified true copy	←	The authorised person's signature
<i>J. Sample</i>	←	Full name, qualification and registration number (if applicable) of the authorised person
Mr John Sample	←	
Justice of Peace	←	
Registration No.123456789	←	
Date: 01/02/2012	←	Date of certification (within 12 months of receipt)

Alternatively, you can refer to the Completing Proof of Identity fact sheet on the fund's website at www.mercersuper.com.au for a list of other people who can certify your ID document(s) and witness your statutory declaration.

If you don't have a driver's licence or passport

You will need to provide a certified copy of one document from each of the following groups:

<ul style="list-style-type: none">• Birth certificate or birth extract¹• Citizenship certificate issued by the Commonwealth• Pension card issued by the Department of Human Services (Centrelink) that entitles the person to financial benefits	AND	<ul style="list-style-type: none">• Letter from the Department of Human Services (Centrelink) or other Government body in the last 12 months regarding a Government assistance payment• Tax Office Notice of Assessment issued in the last 12 months• Rates notice from local council issued in the last 3 months• Electricity, gas or water bill issued in the last 3 months• Landline phone bill issued in the last 3 months (mobile phone bills will not be accepted)
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¹ **Translation:** If your identification is written in a language other than English, the identification must be accompanied by an English translation prepared by a translator accredited by the National Accreditation Authority for Translators and Interpreters Ltd. (NAATI) at the level of Professional Translator or higher (or an equivalent accreditation), to translate from a language other than English into English.

Step 6: Providing your tax file number

There may be tax implications if you have not yet provided, or choose not to provide, your TFN. Whilst it is not compulsory to provide your TFN, not doing so could cost you in the following ways:

- you may have paid more tax than necessary on super contributions made for you by your employer (including SG, salary sacrifice and other contributions) in this financial year. This additional tax can be reversed if you provide your TFN to the fund before the end of the financial year, or your earlier payment from the fund. Although you may be able to claim back this additional tax if you later provide your TFN, time limits and other rules may apply, which may affect the size of any refund.
- you may pay additional tax on your super payout. However it might be possible to claim this back when lodging your tax return.
- you may miss out on any government Super Co-contributions for which you may be eligible; and
- you may have difficulty locating your super in the future, should you lose contact with your fund(s).

(select an option)

My tax-file number is - -

I do not wish to provide my tax-file number to the Trustee.

Signature

Date / /

Step 7: Complete the checklist

To enable your payment to be processed promptly, please ensure you have correctly completed this form before returning it to the fund.

Have you:

- Provided your member details in **Step 1**?
- Attached supporting documentation for any change of name, date of birth or address detailed in **Step 2**?
- Provided complete payment instructions in **Step 3**?
- If requesting payment to SMSF provided:-
 - SMSF Bank Account Statement
 - Electronic Service Address
- Signed and dated the form (**Step 8**)?
- Select the identification you have provided:
 - Current drivers' licence OR current passport; or
 - One document from list one and one document from list two
- Is your identification current? If providing an Australian Passport, one that has expired within the last two years is acceptable.
- Are your documents correctly certified? Ensure the certifier has included ALL of the following on each page:
 - Written or stamped 'certified true copy'
 - Signature and printed name
 - Date – the date MUST be within twelve months of the date we receive your completed form.
 - Qualification (such as Justice of the Peace, Australia Post employee, etc)

Please refer to the "Completing proof of identity" fact sheet on the fund's website at www.mercersuper.com.au or call the Mercer Super Trust Helpline on **1800 682 525**.

Your privacy

We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. Our Privacy Policy outlines the type of information we keep about you and how we, and any organisations we appoint to provide services on our behalf, will use this information. If you do not provide the personal information requested, we may not be able to manage your superannuation. You can read our Privacy Policy online at mercerc.com.au/privacy or you can obtain a copy by calling the Helpline.

The policy also includes details about how you may lodge a complaint about the way we have dealt with your information and how we will handle that complaint.

Step 8: Sign the form

By signing this form I understand and consent to my information being collected, disclosed and used in the manner set out in this form.

- I understand that there may be delay in payment if my details have recently changed.
- I consent to my information being collected, disclosed and used in the manner set out in this form.

Signature

X

Date

/ /

Please return your completed form together with your proof of identity to Mercer Super Trust, GPO Box 4303, Melbourne VIC 3001

Under Australian Tax Office regulations you must keep a copy of this form for five years from the date completed.