

# Westpac Group Plan Benefit Payment Form C

Defined Benefit Members who are Totally and Permanently Disabled (TPD)

Complete this form if you have lodged a claim for release under Total and Permanent Disablement and this claim has been approved.

**Important Note: The pension option is not applicable to former St George Defined Benefit members. Please contact the helpline on 1800 227 262 for more information.**

## 1. Personal details

Family name

Given name(s)

Home address (required – cannot be a PO Box)

State

Postcode

Postal address (if different)

State

Postcode

Date of birth (dd/mm/yyyy)

Member number

Home phone

Work phone

Are you an Australian or New Zealand citizen, or Australian permanent resident? (required)

 Yes No

## 2. Payment reason

Did you lodge a claim for total and permanent disablement (TPD) and have this claim approved?

**No** – Please use the relevant Transfer Option or Benefit Payment form.

**Yes** – go to section 3

### 3. Payment instructions – TPD

**Complete this section if you are being paid a total and permanent disablement (TPD) benefit.**

Please read the Member information booklet from the publications section of [mercERSUPER.COM.AU/WESTPACGROUPPLAN](http://mercERSUPER.COM.AU/WESTPACGROUPPLAN) for information on options and eligibility for receiving your super.

**Important Note:** The pension option is not applicable to former St George Defined Benefit members. Please contact the helpline on 1800 227 262 for more information.

**I would like to take my super under:** (Choose one option)

**Pension option** (this option is only valid for 3 months from the official date your employment ended OR 3 months from the date you were deemed to be TPD)

%

(max 50%) of my lump sum retirement benefit as a pension **and** with the remaining balance of my super: *(tick one or more)*

Transfer to the Mercer Super Trust, Westpac Group Plan. Write TOTAL if you wish to transfer the whole amount.  
Then complete **section 4**

\$  ,    ,    .

Transfer to another super fund. Write TOTAL if you wish to transfer the whole amount. Then complete **section 7**

\$  ,    ,    .

Buy another pension from Westpac Group Plan – Defined Benefit, called the Purchased Pension  
(see notes 1 & 2 below). Then complete **sections 5**

\$  ,    ,    .

Take my super as cash, net of tax. Write MAXIMUM if you want the maximum amount in cash.  
Then complete **section 5**

\$  ,    ,    .

**OR**

**Lump sum option**

Transfer to the Mercer Super Trust, Westpac Group Plan. Write TOTAL if you wish to transfer the whole amount.  
Then complete **section 4**

\$  ,    ,    .

Transfer to another super fund. Write TOTAL if you wish to transfer the whole amount. Then complete **section 7**

\$  ,    ,    .

Buy a Single life purchased pension (see note 2 below). Then complete **section 5**

\$  ,    ,    .

Take my super as cash, net of tax. Write MAXIMUM if you want the maximum amount in cash.  
Then complete **sections 5**

\$  ,    ,    .

**Note 1:** The Purchased Pension is calculated very differently to the pension under the Pension option. If you'd like more information on the Purchased Pension, please call us on 1800 227 262.

**Note 2:** If you don't have a spouse, you may wish to buy a Single life pension instead of choosing the Pension option or Purchased Pension (these usually have pensions payable to a spouse if you die). If you'd like more information on the Single life pension, please call us on 1800 227 262.



## 7. Transfer your benefit to another superannuation fund

Complete this section if you would like to transfer all or part of your benefit to another superannuation fund.

Name of super fund (if there is more than one fund attach details on a separate page)

Mailing address of the fund

State

Postcode

Super fund ABN (required)

Your member number or super fund SPIN (required)

Super fund's product USI (required)

Is this a self-managed superannuation fund (SMSF)?

 Yes No

If yes, we need to confirm that the SMSF is complying and that you are a member of the fund. You must also provide a certified or original copy of a bank statement for the SMSF bank account into which the transfer is being made. This statement must have been issued within the last 3 months.

### SMSF bank account details

Account name

Name of bank or financial institution

Branch

BSB number

Account number

Cheques will be sent directly to your other super fund. If you'd like it sent to your financial adviser instead, please attach a separate page with signed instructions.

## 8. Attach proof of identity

We are required by law to obtain your proof of identity to ensure the benefit we are paying belongs to you. You'll need to provide **certified** copies of the documents below.

**1. a valid Australian Driver's licence or valid Australian passport**

**OR**

**2. one of the following:**

- birth certificate
- Australian citizenship certificate
- pension card issued by Centrelink entitling you to financial benefits

**and**

**one of the following:** (must show your name and residential address)

- letter from Centrelink showing you were paid a financial benefit, less than 12 months old
- notice from council or utilities bill (eg rates notice or telephone bill), less than 3 months old
- a Tax Assessment notice, less than 12 months old

Any documents not in English need to be accompanied by an English translation by an accredited translator.

**Who can certify a document?**

A solicitor, Justice of the Peace, bank officer with more than 2 years continuous service, police officer, pharmacist or post office manager can certify documents. The person certifying must use these words:

***I certify this to be a true copy of the original document sighted by me today on (insert date)***

Insert signature, print full name, print capacity in which they are signing, print address, print date.

