

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
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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 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: <i>(tick one or more)</i>
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
\$ <u></u>
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.

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4. Transfer to Mercer Super Trust, Westpac Group Plan
Complete this section if you would like to transfer all or part of your benefit to the Mercer Super Trust, Westpac Group Plan. I wish to:
Choose the Mercer Growth investment option in Mercer Super Trust for the Defined Benefit portion of my benefit and the investment mix for my SuperSave portion will not change.
OR
Choose the Mercer cash investment option in Mercer Super Trust for the Defined Benefit portion of my benefit and the investment mix for my SuperSave portion will not change.
If you are transferring any part of your benefit to Mercer Super Trust, Westpac Group Plan, this section is mandatory.
5. Bank account details
Complete this section if you are taking any of your super in cash and/or you have chosen to receive a Westpac Group Plan pension.
Please pay my super and/or pension payments to this bank account:
BSB number Account number
Account name (account must be held in your name)
To protect the security of your super, please attach a certified or original copy of a bank statement for this account, showing your name and account number. If you are taking your super in cash and you don't provide a certified or original copy of your bank statement, then a cheque will be sent to you instead. This statement must have been issued within the last 3 months. If you're under age 60 and you have chosen a pension option, you'll also need to complete a Tax File Number (TFN) declaration from the Australian Tax Office. Please call us and we will send you one.
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6. Spouse details
Complete this section if you have chosen to receive a Westpac Group Plan pension.
If you have selected either the Pension option or Purchased Pension Option, a pension may be payable to your spouse if you predecease him/her. Please provide your spouse's details for our records. Note: If you don't have a spouse, please write "N/A" in the boxes below.
Spouse's name Date of birth (dd/mm/yyyy)

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
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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.

9. Checklist
To protect the security of your super, your payment request cannot be processed unless all the necessary requirements below have been completed.
Check you have:
Completed all fields marked 'required' on this form
Attach proof of identity – do not send original identification documents. Only send certified copies (copies must show original signature of the person who certified it).
If are taking any super in cash, attach certified or original copy of a bank statement for the account you have nominated (showing name and account number). This statement must have been issued within the last 3 months.
If you have elected to transfer any super to an SMSF, attach certified or original copy of a bank statement for the account you have nominated (showing your name and account number). This statement must have been issued within the last 3 months.
If you'd like anything sent to your financial adviser, attach a separate page with signed instructions. If your adviser would like to speak to us direct, please call us on 1800 227 262 for instructions on providing an authority to release information.
10. Signature
I declare that I have received, read and understood the information provided to me from the Westpac Group Plan – Defined Benefit – Pension (including Spouse pension) and the information provided on this form is true and correct. Signature Date
X
Print name
Return this form by:
— • Mail Fax
Westpac Group Plan – Defined Benefit, This form will not be accepted by fax Locked Pag A40EE Sydney South NSW 132E