

Westpac Group Plan Transfer out form (Defined Benefit Members)

Complete this form if you're a Westpac employee and want to transfer your Westpac Group Plan – Defined Benefit SuperSave account to another fund.

1. Issues to consider before transferring

Please read your Member information booklet (or Product disclosure statement) for full details on the consequences of transferring your super out. You can only transfer all (or part) of your SuperSave account under current super law. You cannot transfer any other part of your super.

2. Personal details

Given name(s)

Family name

Other names the client is known by

Date of birth (dd/mm/yyyy)

Employee number

Home address (required)

State

Postcode

Country, if not Australia

Postal address (if different from above)

State

Postcode

Country, if not Australia

Daytime phone (required)

Mobile phone number

Occupation

Employment Type (only if primary customer)

- | | | |
|--|---|---|
| <input type="checkbox"/> Full time | <input type="checkbox"/> Unemployed | <input type="checkbox"/> Casual |
| <input type="checkbox"/> Self employed | <input type="checkbox"/> Dependent contractor | <input type="checkbox"/> Retired |
| <input type="checkbox"/> Temporary | <input type="checkbox"/> Independent contractor | <input type="checkbox"/> Social security recipient |
| <input type="checkbox"/> Student | <input type="checkbox"/> Part time | <input type="checkbox"/> Other (home duties/work compensation/etc.) |

3. Transfer amount

I wish to transfer:

My total balance or:

\$, .

(specify amount)

Remember, as a Defined Benefit member you can transfer your SuperSave account only.

4. Other fund details

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)

Cheques will be sent directly to your super fund. If you'd like it sent to your financial adviser instead, attach a separate, signed page to this form with your financial adviser's details.

5. 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. Primary Photographic Identification Document *(provide one of the following)*

- Australian driver's licence/learner's permit
- Australian passport (a passport that has expired within the preceding 2 years is acceptable)
- Australian proof of age card issued by a State or Territory
- Foreign passport or travel document issued by a foreign government, the United Nations or an agency of the United Nations (must not be cancelled, defaced or mutilated) which contains either a signature OR a unique identifier of the person*
- Foreign driver's licence/permit that contains a photograph of the person in whose name it was issued and the individual's date of birth*
- National identity card issued by a foreign government, the United Nations or an agency of the United Nations which contains either a signature OR a unique identifier of the person

OR

2. Primary Non-Photographic Identification Document AND ONE Secondary Identification Document *(required if you do not own a Primary Photographic Identification Document)*

Select ONE Primary Non-Photographic Document from this section

- Australian birth certificate (or extract)
- Australian citizenship certificate
- Pension card issued by Department of Human Services
- Health card issued by Department of Human Services
- Foreign birth certificate issued by a foreign government, the United Nations or an agency of the United Nations*
- Citizenship certificate issued by a foreign government*

AND ONE Secondary Identification Document from this section

- A notice issued by the Commonwealth or a State/Territory within the last 12 months that includes the individual's name and residential address and records the provision of financial benefits (e.g. Centrelink notice)
- A notice issued by the Australian Taxation Office (ATO) within the last 12 months that includes the individual's name and residential address and records a debt payable by or to the individual (e.g. tax assessment)
- Utilities notice issued by a local government or utilities provider within the last 3 months and includes the customer's name and residential address and records the provision of a service to that address or name
- Foreign driver's licence which does not contain a photograph*
- Department of Veterans' Affairs pension concession card (Australian)
- A current tenancy/lease agreement (must not be cancelled or expired)
- Medicare card
- Australian Marriage certificate issued by State/Territory
- Registry of Births, Deaths and Marriages

- Identification card issued to a student at an Australian higher education institution (TAFE or University) which contains a photograph and signature
- A current card issued under a Commonwealth, State, or Territory law for the purpose of identification, for a government service, or as a licence

* Documents that are written in a language that is not English must be accompanied by an English translation prepared by a National Accreditation Authority for Translators and Interpreters (NAATI) translator.

Eligible Document Certifiers within Australia

- A person who, under a law in force in a State or Territory, is currently licensed or registered to practise in one of the following occupations:
 - Chiropractor
 - Dentist
 - Legal practitioner
 - Medical practitioner
 - Nurse
 - Optometrist
 - Patent attorney
 - Pharmacist
 - Physiotherapist
 - Psychologist
 - Trademarks attorney
 - Veterinary surgeon
- A person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner (however described)
- Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
- Bailiff
- Bank officer with 2 or more continuous years of service
- Building society officer with 2 or more years of continuous service
- Chief executive officer of a Commonwealth court
- Clerk of a court
- Commissioner for Affidavits
- Commissioner for Declarations
- Credit union officer with 2 or more years of continuous service
- Employee of the Australian Trade and Investment Commission who is:
 - in a country or place outside of Australia; and
 - authorised under paragraph 3(d) of the Consular Fees Act 1955; and
 - exercising his or her function at that place

5. Attach proof of identity

- Employee of the Commonwealth who is:
 - in a country or place outside Australia; and
 - authorised under paragraph 3(c) of the Consular Fees Act 1955; and
 - exercising his or her function in that place
- Fellow of the National Tax Accountants' Association
- Finance company officer with 2 or more years of continuous service
- Holder of a statutory office not specified elsewhere in this table
- Judge of a court
- Justice of the Peace
- Magistrate
- Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961
- Master of a court
- Member of Chartered Secretaries Australia
- Member of Engineers Australia, other than at the grade of student
- Member of the Association of Taxation and Management Accountants
- Member of the Australian Defence Force who is:
 - an officer; or
 - a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with 2 or more years of continuous service; or
 - a warrant officer within the meaning of that Act
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the Institute of Public Accountants
- Member of:
 - the Parliament of the Commonwealth; or
 - the Parliament of a State; or
 - a Territory legislature; or
 - a local government authority of a State or Territory
- Minister of religion registered under Subdivision A of Division 1 of Part IV of the Marriage Act 1961
- Notary public
- Permanent employee of the Australian Postal Corporation with 2 or more years of continuous service who is employed in an office supplying postal services to the public
- Permanent employee of:
 - the Commonwealth or a Commonwealth authority; or
 - a State or Territory or a State or Territory authority; or
 - a local government authority with 2 or more years of continuous service and is a person not already specified elsewhere in this table
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- Police officer
- Registrar, or Deputy Registrar, of a court
- Senior Executive Service employee of:
 - the Commonwealth or a Commonwealth authority; or
 - a State or Territory or a State or Territory authority
- Sheriff
- Sheriff's officer
- Teacher employed on a full-time basis at a school or tertiary education institution
- Member of the Australasian Institute of Mining and Metallurgy
- An officer with, or authorised representative of, a holder of an Australian financial services licence, having 2 or more years of continuous service with one or more licensees
- An officer with, or a credit representative of, a holder of an Australian credit licence, having 2 or more years of continuous service with one or more licensees

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 and print date.

6. Checklist

Check you have:

- Completed all fields marked 'required' on this form
- Attach proof of identity
- If you'd like anything sent to your adviser, attach a separate page with details. You must sign this page.

To protect the security of your super, your transfer cannot be processed unless all required fields are completed and proof of identity has been provided.

7. Signature

By signing this Transfer out form, I am making the following declarations:

- I declare that I have fully read this form and declare that the information completed on this form is true and correct.
- I am aware that I may ask the Trustee of the Westpac Group Plan – Defined Benefit for information I reasonably require to understand my benefit entitlements (including information on fees, charges or the effect of transferring my super) and I do not require any further information.
- I understand and acknowledge the implications of transferring my super from Westpac Group Plan – Defined Benefit to the new fund(s).
- I understand that the trustee can decline this request if I have already requested a transfer to another fund in the previous 12 months.
- I request and consent to the transfer of my super from Westpac Group Plan – Defined Benefit to my new fund(s) as indicated in this form.
- I discharge the Trustee from all further liability in respect of the benefits paid and transferred to the nominated rollover fund(s).

Signature

Date

Print name

Return this form by:



Mail
Westpac Group Plan – Defined Benefit,
Locked Bag A4055, Sydney South NSW 1235.

Only originals will be accepted. Do not fax.

We will process your transfer request as soon as possible, but no later than 30 days after receiving your request or after receiving any further information we may need to ask for.