

REI Super Pension Request for Partial/Full Commutation

If you need help

For assistance, information on your benefit entitlements, or to access the Privacy Policy and your personal information call the Helpline on 1300 13 44 33.

Step 1 – Complete your personal details Please print in black or blue pen, in uppercase, one character per box. A

Title Mr Mrs Ms Miss Date of birth / /

Given names

Surname

Street address

Suburb State Postcode

Telephone - Mobile

E-mail

Member number

Pension Type. Select an option

Allocated Pension

Transition to Retirement Allocated Pension

Step – 2 Provide payment instructions

Please pay the commutation of my pension as follows:

OPTION 1: PAY AS CASH Select an option

Full commutation (if available under the rules of the plan)

or

A partial commutation of \$, . Net of tax

Note that for Transition to Retirement Allocated Pensions the payment will be deducted from your unrestricted non- preserved component.

Please note that:

- The minimum amount for a partial commutation is \$5,000.00.
- Payments will be paid either by cheque (in the name of the account holder only) and sent to the address shown in Step 1, or by EFT to the account where your regular pension payments are forwarded.

Continued over



Step 3 – Complete preservation declaration

To be completed by Transition to Retirement Pensioners only.

Pensions cannot be fully commuted until the following conditions have been met:

- 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 and attach proof of age to allow your benefit payment to be processed (e.g. certified copy of your driver's licence, passport or birth certificate).

Select one option

- Yes, I am at least 60 years of age and I have ceased employment since attaining age 60.
- Yes, I have reached preservation age, ceased employment and permanently retired from the workforce.

Step 4 – How do you want to prove your identity?

You will need to provide proof of your identity when you take a cash payment or rollover/transfer to another super fund. You should read the information attached to this form called "How to apply for a super payout" to check what proof of ID is required.

Choose one of the two options below:

Use my Tax File Number (TFN)

This option is only available if you want to rollover/transfer your super to a complying super fund (if you wish to take a cash payment or rollover/transfer your super to an SMSF, you will need to provide certified proof of identity).

REI Super might already hold your TFN. If you're not sure if you have previously provided it, you can choose to do so now. You do not have to provide your TFN, but if you do, this will ensure that any benefit you take from **REI Super** does not incur additional tax. *Please also refer to the 'How to apply for a super payout' leaflet for additional information about providing your TFN.*

Enter your TFN here

- -

By providing your TFN, you are authorising us to give this information to your other super fund.

Please note: We will validate your TFN and personal details with the Australian Tax Office. If we cannot confirm an exact match with the ATO's records, you will be required to provide full Proof of Identity (see below) and your payout will be delayed.

- I have attached certified proof of identity documents. For full details on completing proof of identity, refer to the "Completing proof of identity" fact sheet on the fund's website at www.reisuper.com.au or call the Helpline on **1300 13 44 33**.



Step 5 – 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**?
- Provided complete payment instructions in **Step 2**?
- Provided SMSF Bank Account Statement, if requesting payment to SMSF?
- Signed and dated the form in **Step 6**?
- If you are required (or choose) to provide proof of identity, 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.
- Do your documents need to be certified? If so, 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.reisuper.com.au or call the Helpline on **1300 13 44 33**.

Your Privacy

The Fund is administered by us along with our service provider, Mercer Outsourcing Australia Pty Ltd (Mercer). We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information about the other products and services offered by us and our related companies. If you do not wish to receive marketing material, please contact us on 1300 13 44 33.

Our Privacy Policies are available to view at reisuper.com.au or you can obtain a copy by contacting us on 1300 13 44 33.

If you do not provide the personal information requested, we may not be able to manage your superannuation.

We may sometimes collect information about you from third parties such as your employer, a previous super fund, your financial adviser, our related entities and publicly available sources.

We may disclose your information to various organisations in order to manage your super, including your employer, our professional advisers, insurers, our related companies which provide services or products relevant to the provision of your super, any relevant government authority that requires your personal information to be disclosed, and our other service providers used to assist with managing your super.

In managing your super your personal information will be disclosed to service providers in another country, most likely to Mercer's processing centre in India. Our Privacy Policies list all other relevant offshore locations.

Our Privacy Policies set out in more detail how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact us on 1300 13 44 33 or write to our Privacy Officer, GPO Box 4303, Melbourne VIC 3001.



Step 6 – Sign the form

By signing this form:

- I have read and understood 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 a delay in payment if my details have changed.
- I understand that under Tax Office regulations, I must keep a copy of this form for five (5) years from the date completed.

Signature

Date

 / /

Please return your completed form to REI Super, GPO Box 4303, Melbourne, VIC 3001.

