

Income account withdrawal

Please complete and sign this form and return by:

- ☒ Mail to: BUSSQ GPO Box 2775, Brisbane Qld 4001 or
☒ Email to: super@bussq.com.au.

Need help? If you require help completing this form call **1800 692 877** or email super@bussq.com.au.

1 Personal details

BUSSQ member number (if known)	Date of birth (dd/mm/yyyy)	
<input type="text"/>	<input type="text"/>	
Mr/Mrs/Ms/Miss	Given names	Surname
<input type="text"/>	<input type="text"/>	<input type="text"/>
Contact number or mobile	Email	
<input type="text"/>	<input type="text"/>	
Street number	Street address	
<input type="text"/>	<input type="text"/>	
Suburb/Town	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Postal address (if different to above)		
<input type="text"/>		
Suburb/Town	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

2 Proof of identity

To protect your superannuation account and satisfy our obligations under the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*, we need you to prove your identity before making withdrawals. You have two options for verifying your identity, please select one below.

Option 1

☐ **Electronic verification**

BUSSQ can easily verify your identity electronically. You just need to provide your driver's licence or passport number details below and we arrange the checks for you. **This option is not available for people currently living overseas.**

I authorise BUSSQ to disclose my name, address, date of birth and information below to a credit reporting agency to check and report to BUSSQ on whether the details I provide match the personal information held by the credit reporting agency. Checking your identity this way is not a credit check. This check will not give BUSSQ access to any other information about you and will not impact your credit rating or be stored against your credit information file. If the details you provide cannot be matched we will advise you in writing, and you will need to supply us with certified documents – see Option 2.

Australian driver licence

Full name as it appears on your driver licence

Driver licence number

Card Number

Note: For help to locate your Card Number refer to the 'Certified documentation' section on page 5 of this form.

State of issue

Expiry date

/ / 20

Australian passport

Passport number

Country of birth

Full name as it appears on your passport

Option 2

☐ Provide certified documents (see the 'Certified documentation' section of this form for more information).



Please mail documents if providing certified proof to BUSSQ's address, which is provided on this form.

3 Amount of withdrawal

I would like to withdraw the following amount (minimum \$1,000) from my account. A minimum balance of \$8,000 must be retained to keep your Income account open.

- ☐ An amount of Amounts are net of any applicable tax.
- ☐ The balance of my account
- ☐ Keep minimum of \$8,000

4 Investment options

- ☐ I would like the withdrawal to be made: ☐ From my current payment option, or
- ☐ From investment option.

5 Payment options

I would like my withdrawal paid as follows:

- ☐ Paid to the same bank account used for my regular Income account payments
- ☐ Rolled over to a complying super fund (see Section 6)
- ☐ Rolled over to a BUSSQ Super account. Select one of the below options for this.

- ☐ My existing BUSSQ Super account, member number
- ☐ Please open a new BUSSQ Premium Choice account for me. **(Complete the below sections)**

If you have chosen to open a new BUSSQ Premium Choice account complete the below sections.

- ☐ I acknowledge that I have read and understood the terms and conditions contained in the BUSSQ Premium Choice Product Disclosure Statement and supporting documents.
- ☐ I understand that my funds will be invested 100% in the Premium Balanced Growth option. I realise that once my membership has been processed I can switch my investment option to any of the other options available in Premium Choice by logging onto MemberAccess at bussq.com.au, calling us on 1800 692 877 or by downloading an Investment Choice form from our website and submitting it.

INSURANCE

BUSSQ offers insurance options as detailed in the *MySuper PDS*, *Premium Choice PDS* and the *Insurance Handbook*. You may not be eligible for insurance. You are eligible for this insurance only if you meet all the eligibility criteria detailed in the *Insurance Handbook*. If you wish to apply for insurance or have any questions, please call us on **1800 692 877**.

YOUR TAX FILE NUMBER (TFN)

If you have already provided your TFN to BUSSQ you don't need to provide this again.

- You don't have to provide your TFN and it's not an offence if you don't. If you do, BUSSQ will only use and disclose it for purposes approved by law, including finding and identifying your super, calculating tax and providing information to the ATO. These purposes may change in the future.
- If you choose not to provide your TFN you may pay more tax on your benefits and contributions and you will not be able to make personal contributions to BUSSQ. These consequences may change in the future.
- BUSSQ will disclose your TFN to another superannuation fund if you transfer your benefits there unless you advise us in writing that you do not want your TFN disclosed.

I elect to provide my TFN and declare it is:

6 Rollover details

Please complete this section to rollover your Income account to another fund.

Name of new fund

New fund membership number

USI/SPIN number of new fund

ABN of new fund

7 Have you met a condition of release?

Please select one option only:

☐

I have reached preservation age and permanently retired*

☐

I have ceased employment after reaching age 60*

Date ceased work (dd/mm/yyyy)

☐

My funds are unrestricted non-preserved

☐

I am over age 65 and still working



***Please provide a copy of your separation certificate.**

8 Residency declaration

I declare that: (Please tick the box that applies to you)

☐

I am an Australian citizen, New Zealand citizen or permanent resident of Australia, or

☐

I hold a Subclass 405 (Investor Retirement) or Subclass 410 (Retirement) visa.

9 Privacy and other important information

BUSSQ collects and uses your personal information in accordance with the BUS SQ Privacy Policy which is available from our website or by calling **1800 692 877**. Please call us if you have any questions about your rights under the privacy legislation.

10 Authorisation and declaration

- I request a withdrawal be paid as indicated on this form from my Income account.
- I am aware that before I rollover to a new fund I should obtain all relevant details of the BUS SQ fund, and I understand and acknowledge the implications of transferring my benefits.
- If I have selected option 1 in section 2 I consent to my personal information being disclosed to verify my identity electronically.
- If I have requested a new BUS SQ Premium Choice account be opened for me I declare that I have read and understood the Premium Choice Product Disclosure Statement (PDS) available at **bussq.com.au** and I understand my funds will be invested the in Premium Balanced Growth option upon opening the account.
- I understand that tax may be deducted from my withdrawal as outlined in the PDS.
- I accept the conditions set out in the Trust Deed and Rules of BUS SQ as amended from time to time. They are available at **bussq.com.au/disclosure**
- I have read and understand the Income account PDS.
- I am the person named on this form or I have a power of attorney to act on the member's behalf and have supplied to BUS SQ my certified Power of Attorney and identity documentation.
- I declare that I have fully read this form and that the information completed on this form is true and correct.



Please sign and date.

Forms without both a signature and date are unable to be processed.

Signature of applicant



Dated (dd/mm/yyyy)

Once completed and signed please return this form to: BUS SQ GPO Box 2775, Brisbane Qld 4001 or email to super@bussq.com.au.

Please note: If providing certified proof of ID, these documents must be mailed to BUS SQ at the address above.

Certified documentation

For Option 2 under Proof of Identity (Section 2 of this form), you need to provide certified documents to prove your identity. Follow the below guide and mail your certified documents with your completed form to **BUSSQ GPO Box 2775, Brisbane QLD 4001**.

Please note certified proof of identity is only valid for a maximum of 12 months from the date the identification was certified.

Certified copies of the following documents can be used to prove your identity:

One of the following documents only:

- A current driver licence or permit issued under the law of a State or Territory.
- A passport issued by the Commonwealth which can be up to two years out of date, that contains a photograph of the person in whose name the document is issued.
- Proof of Age Card
 - A card issued under a law of a State or Territory for the purpose of providing the person's age which contains a photograph of a person in whose name the document is issued (includes Proof of Age Card or National Identity Card).
- National Identity Card
 - A card issued for the purpose of identification that contains a photograph and the signature of the person in whose name the document is issued; and
 - Is issued by a foreign government, the United Nations or an agency of the United Nations; and
 - If it is in a language that is not understood by the person carrying out the verification it must be accompanied by an English translation prepared by an accredited translator.

OR

One of the following documents:

- Birth certificate or birth extract
- Citizenship certificate issued by the Commonwealth
- Pension card issued by Centrelink that entitles you to financial benefits.

AND

One of the following documents:

- Letter from Centrelink regarding a Government assistance payment
- Notice issued by Commonwealth, State or Territory Government within the past 12 months, containing your name and residential address.

For example:

- Tax Office Notice of Assessment
- Rates notice from local council.

Have you changed your name?

If you have changed your name, in addition to the above listed certified documentation, you need to supply a certified copy of one of the following documents:

- Marriage Certificate (required even if the parties are separated)
- Decree Nisi, Certificate of Divorce or Decree Absolute
- Deed Poll Documentation.

Are you acting on behalf of someone else?

If you are signing on behalf of another person you will need to send by mail original certified copies of the following documents (we cannot accept these via email):

- Current Power of Attorney document (with each page of the document certified)
- The member's identity documents
- Your identity documents.

Certifying your documents

All copies of proof of identity documents should be certified as a true copy of the ORIGINAL by an authorised person. Some examples of authorised persons are:

- A Justice of the Peace or Commissioner for Declarations
- A Police Officer
- A finance company officer or representative of an AFSL license holder with five or more years continuous services with one or more licensees
- A lawyer, judge or magistrate
- Permanent employee of Australia Post with five or more years of continued service.

The certifier must sight the original and make sure both documents are identical, and then make sure all photocopied pages are certified as true copies by writing or stamping wording to that effect followed by their:

- Signature
- Name
- Qualification
- Date, and
- Phone number.



I certify this is a true copy of the original document.

Julie Preston
Justice of the Peace
19/06/2022
0412 345 678

Where to find the Card Number on your driver licence?

You can find your Card Number on the front and/or back of your driver licence. It is different from the licence number, as it's a unique identifier, which changes each time your driver licence is re-issued.

Note: The location for the Card Number does slightly vary amongst different state issued driver licences. The example images show where the Card Number is situated for the Queensland Driver Licence being both on the front and back.

If you need help to locate the Card Number on your driver licence, call us on **1800 692 877**.



Card Number



Card Number

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