



Withdrawal

RI Allocated Pension and Transition to Retirement Pension



This form allows you to make additional withdrawals of \$1,000 or more, roll over to another fund and/or close your account.

If you are an RI Allocated Pension member and you only want to make a partial withdrawal, please use the 'Partial payment' form, available at gesb.wa.gov.au/forms.

How long will it take?

We aim to process your request within 10 working days after receiving your form and all necessary information. However, there are circumstances where it may take us longer to process your request.

Section 1 Your details

GESB member number

WIN No. Office Use Only

Retirement Income Pension account number

Mr Mrs Miss Ms Other

Surname (family name)

Given name(s)

Date of birth / / Male Female

Residential address

Postcode

Postal address (if different from residential)

Postcode

Email address

Telephone – home

Telephone – work

Section 2 Withdrawal options

Select whether you are requesting full withdrawal (which closes your account) or a partial withdrawal.

Full withdrawal (go to Section 3 - Financial institution details or Section 4 - Roll over to other fund)

OR

Partial withdrawal (payment will be proportioned between your tax-free and taxable components)

Amount \$

For partial withdrawals only

There may be some tax payable on your withdrawal. Specify whether you would like your payment amount:

Gross (before tax)

Net (after tax)

I am aged 60 or over and tax is not payable on my withdrawal

Specify the investment plan(s) your partial withdrawal is to be taken from (minimum total withdrawal of \$1,000 gross):

- Growth plan/Growth plan TTR \$
 - Balanced plan/Balanced plan TTR \$
 - Conservative plan/Conservative plan TTR \$
 - Cash plan/Cash plan TTR \$
- TOTAL** \$

OR

(Section 2 continued over page)



If you are in Mix Your plan, specify the asset class(es) your partial withdrawal is to be taken from (minimum total withdrawal of \$1,000 gross):

- Cash/Cash TTR
 - Fixed Interest/Fixed Interest TTR
 - Australian Shares/Australian Shares TTR
 - International Shares/International Shares TTR
 - Property/Property TTR
- TOTAL**

Section 3 Financial institution details

Tick appropriate option:

- Pay my benefit electronically to the nominated personal bank account that my pension payments are currently being made to.

Go to section 5.

OR

- Nominate an alternative personal bank account in my name

For security purposes provide a copy of your bank statement showing your full name, the bank's name, BSB number and account number. If providing an internet bank statement add your signature, printed name and date to the page. Credit card, business or 'trading as' accounts, overseas, and third party payments are not allowed.

Bank/building society or credit union name

Branch address (suburb only)

BSB number

 -

Account number

Account name

Section 4 Roll over to other fund

- Complete this section if you wish to roll over to another complying super fund, which can include your GESB Super or West State Super accounts
- If you require your super to be rolled over to more than one fund, photocopy this part of the form and complete the information below for each external fund. Include a breakdown of the individual amounts that you would like rolled over
- We may be required to make a pro-rata pension payment to you prior to processing the rollover
- If you need further information to complete this section contact your destination fund

Name of destination fund

Name of product/plan

Telephone number of destination fund

Address of destination fund

Postcode

Unique Superannuation Identifier (USI) of destination fund

AND

Membership number at destination fund

OR

Roll over to your Self Managed Super Fund (SMSF)

Complete this option if you want to roll over your benefit to a registered SMSF.

ABN of SMSF

Name of SMSF

Membership number of SMSF

Contact phone number of SMSF

(Section 4 continued over page)

Nominate how you would like the benefit to be paid.

Cheque

We will send your roll over cheque to the address registered with Super Fund Lookup. For more details visit superfundlookup.gov.au.

Nominated SMSF bank account

For security purposes, provide a copy of the SMSF bank statement showing the name of the SMSF, the bank's name, BSB number and account number. If providing an internet bank statement, all this information is still required and in addition you need to add your signature, printed name and date to the page. You must provide a copy of the bank statement otherwise your payment will be made by cheque.

Bank name

BSB number

 -

Account number

Account name

Section 5 Providing proof of identity

We are required to verify your identity before you can withdraw part or all of your benefit. If we currently hold valid identification for you, we can continue to use that document to satisfy identification requirements. This assumes that the identification continues to verify your personal details.

Have you previously supplied us with valid identification?

Yes – Go to section 6.

No – to see the documentation that you need to provide, refer to the **'Proof of identity'** fact sheet, available at gesb.wa.gov.au/brochures.

Section 6 Declaration and signature

I declare that:

- The information supplied on this form is true and correct
- I have read and fully understand the **'Retirement Income Pension Product Information Booklet'**
- I understand this additional lump-sum withdrawal may affect the tax treatment of my pension
- I understand GESB may be required to make a pro-rata pension payment to me prior to processing my personal withdrawal
- I understand GESB does not provide personal financial advice and accepts no responsibility in relation to my request

Your signature

Date

More information

- We will send you a confirmation notice upon completion of your instructions
- For more information visit gesb.wa.gov.au or call your Member Services Centre on 13 43 72

Send your completed form and original certified copies of proof of identity to:

GESB
PO Box J 755
Perth WA 6842

Checklist

- All sections have been completed
- Your date of birth (Section 1)
- If you have nominated a new bank account for your funds to be paid to, you must provide a copy of your bank statement. If we do not have a copy of your bank statement, your payment will be made by cheque (Section 3)
- Original certified proof of identity documents (this is only required if your details have changed or if you have not previously supplied us with valid identification - see Section 5)
- Certified linking document if you have changed your name (see the **'Proof of identity'** fact sheet, available at gesb.wa.gov.au/brochures)
- Any additional documentation to support your request

Note: we have a privacy statement that explains how we handle information about individuals responsibly. Our privacy statement is available at gesb.wa.gov.au/privacy or can be obtained by contacting your Member Services Centre on 13 43 72.

How to contact us

T Member Services Centre 13 43 72
PO Box J 755, Perth WA 6842

F 1800 300 067

W gesb.wa.gov.au