



Withdrawal

RI Allocated Pension and Transition to Retirement Pension



To request this document in an alternative format such as Braille, call us on 13 43 72 or use our Live Chat service at gesb.wa.gov.au.

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.

If you have a Transition to Retirement Pension, and you've met a condition of superannuation release, and want to access your funds, you also need to complete a *Notification of retirement or ceasing current employment form* available at gesb.wa.gov.au/forms. You need to do this to acknowledge that you have met the eligibility criteria for accessing your funds.

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

Last name

Given name(s)

Date of birth / / Male Female

Residential address

Postcode

Postal address (if different from residential)

Postcode

Email address

Mobile phone number

Work phone number

Section 2 Withdrawal options

Select whether you are requesting a 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 age 60 or over and tax is not payable on my withdrawal

If you have multiple investment options, select whether you want to withdraw the amount proportionally according to your investment mix OR select the investment option(s) your partial withdrawal is to be taken from (minimum total withdrawal of \$1,000 gross).

Please tick if you want your benefit paid proportionally according to your investment mix

Please tick and fill out the below if you want to choose the investment option(s) and amount you want your benefit paid from

(Section 2 continued over page.)



Section 2 Withdrawal options (continued)

- Growth/Growth TTR
 - Sustainable Balanced
 - Balanced/Balanced TTR
 - Conservative/Conservative TTR
 - 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

Note: if no selection is made, the payment will be made to the bank account your pension payments are currently being paid to.

Tick the 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 you are providing an internet bank statement, it must show your bank name and logo. If it doesn't, you must add your signature, printed name and date to the page. Credit card, mortgage accounts without a redraw facility, 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 existing GESB Super or West State Super accounts. If you are rolling your benefit into a new GESB Super account, you agree to the 'new GESB Super account' conditions below

Rolling your benefit into a new GESB Super account

By completing this section and signing this form you agree that:

- You have read the *GESB Super product information booklet* available at gesb.wa.gov.au/brochures and understand it contains general information only and does not take into account your investment objectives, financial situation or needs
 - You understand your benefit will be invested in GESB Super's default investment option (My GESB Super). To change your investment option use an *Investment choice form*, available at gesb.wa.gov.au/forms
 - If you have an existing West State Super account, GESB will not be able to open a new GESB Super account for you
- 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 roll over
 - 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

(Section 4 continued over page.)

OR

Roll over to your Self Managed Super Fund (SMSF)

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

ABN of SMSF

Name of SMSF

Electronic Service Address (ESA) Alias of SMSF

Membership number of SMSF

Contact phone number of SMSF

SMSF bank details

- For security purposes, provide a copy of the SMSF bank statement showing the name of the SMSF, the bank's name and logo, BSB number and account number. If you are providing an internet bank statement, it must show your bank name and logo. If it doesn't, you must add your signature, printed name and date to the page.

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

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

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

Important:

Digital signatures and digitally signed forms are not accepted.

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 (Section 3)
- If rolling over to an SMSF, you must provide a bank statement or letter from your bank confirming account details otherwise payment will not be made
- 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