# Request a Benefit Payment from GuildPension (including a TTR account)

GuildPension

## What you need to do

This form should be completed to request a lump sum withdrawal (commutation) from your GuildPension account or to roll your account balance out of GuildPension. Post the completed form to: **GuildPension, GPO Box 1088 Melbourne VIC 3001**

If you have any queries phone GuildPension on **1300 361 477**.

## 1. Personal details (please complete all sections and provide your details in block letters)

Member no. | Date of birth | Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other (Specify):

Surname | Given name(s)

**POSTAL ADDRESS**

Street no./ PO Box | Street name | Suburb

State | Postcode | Country

Phone (H) | Phone (W) | Mobile phone

Email

**RESIDENTIAL ADDRESS**

☐ Same as postal address ☐ Different to above; please complete the information below

Street no. | Street name | Suburb

State | Postcode | Country

## 2. Proof of Identity (See 'Completing proof of Identity')

☐ I have attached a certified copy of my driver's licence or passport

**OR**

☐ I have attached certified copies of both:

☐ Birth/Citizenship Certificate or Centrelink Pension Card

*AND*

☐ Centrelink payment letter or Government or local council notice (<1 year old) with my name and address

## 3. Cash withdrawal

**I advise I would like to have a cash payment made to myself:**

☐ Full account balance, OR ☐ Partial account balance to the amount of $

Your cash withdrawal will be paid into the same bank account/postal address used to pay your regular pension payments.

You must satisfy **ONE** of the following circumstances, please indicate which one applies to you.

☐ I have reached my preservation age, left my employer and permanently retired from the workforce (visit guildsuper.com.au/preservation to calculate your preservation age).

☐ I am at least 60 years old and have left my employer.

☐ I am at least 65 years old.

☐ There are other conditions of release. Please contact our Member Services Team on **1300 361 477**.

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## 3. Cash withdrawal (continued)

**Only for Transition to Retirement (TTR) members not in a retirement phase pension:**

TTR lump sum cash withdrawals are permitted after you have permanently retired from the workforce. Please provide the date you permanently retired for the workforce. Date

Lump sum withdrawals are permitted in other limited circumstances.

If you have not permanently retired from the workforce please tick which circumstance applies to you and we will contact you shortly:

- ☐ Death of member
- ☐ Permanent incapacity
- ☐ Severe financial hardship
- ☐ Terminal illness
- ☐ Your account includes an unrestricted non-preserved amount
- ☐ To pay a superannuation surcharge
- ☐ To satisfy a family law split
- ☐ To transfer to another (non commutable) income stream or back to another superannuation fund
- ☐ Compassionate grounds

**EFT payment details:**

Financial Institution name | BSB no. | Account no.

Account holder's name

## 4. Rollover (only complete this section if you are rolling over to another fund)

☐ Rollover full account balance OR ☐ Rollover partial account balance: $

**Details of other fund:** (please ensure ALL fields are completed as processing delays may occur if this is not the case)

Fund name | This is a Self Managed Super Fund.* ☐

Fund phone number | Fund ABN (Australian Business Number)

Member/account no. | SMSF ESA

Fund USI (Unique Superannuation Identifier

For SMSF Rollovers we require a Electronic Service Address (ESA), you will be able to obtain your ESA from your SMSF administrator or accountant.

If the ABN/USI is not available please provide a certificate of compliance. This is available from the Fund you are transferring to.
If exempt from an ABN, tick the reason for exemption:

☐ Exempt Public Sector Super Scheme ☐ Retirement Savings Account

Please ensure your fund's address is up-to-date by checking the ATO's website **superfundlookup.gov.au**.

**EFT payment details:**

Financial institution name

Account holder's name | BSB no. | Account no.

* Note: All payments to a Self Managed Super Fund (SMSF) will be paid by EFT. Please provide details above.

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## 5. Declaration

I have included a certified copy of my proof of identity documents with this request. I hereby declare that the information provided above is true and correct. I authorise the Trustee to do all things necessary to give effect to this request.

Signature ✗

Date

## Next steps

Please complete form and post, along with your certified ID, to GuildPension:

**GuildPension Member Services, GPO Box 1088, Melbourne VIC 3001**

## Need help?

Call Member Services on **1300 361 477**
or visit **guildsuper.com.au**

Issued by Stewarda Pty Ltd ABN 56 098 527 256, AFSL 236049, RSE Licence L0000185 as trustee of the Smart Future Trust ABN 68 964 712 340, RSE Registration No R1000566 (the Fund). GuildSuper and GuildPension are products in the Fund.

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# Completing Proof of Identity

GuildPension

## STEP 1

### Go to an authorised person

(e.g., a person at your local pharmacy, school, bank, police station or post office – see Additional Note 1)

Take with you the following photographic identification documents (ID):

- Either your CURRENT driver's licence or passport (see Additional Notes 2 and 3) AND
- Photocopies of your CURRENT driver's licence or passport.

**Photographic identification documents must contain your photo and signature** and must not be expired (except for Australian passports which may have expired within the last two years).

**If you are using your driver's licence and you have moved address**, you'll need to provide photocopies of BOTH sides.

If you've **changed your name**, you must also provide a certified copy of the relevant name change document, for example, a Marriage Certificate, deed poll or change of name certificate from the Registry of Births, Deaths & Marriages, in addition to the above identification (see Additional Note 2).

If your **legal name or date of birth does not match our records** (excluding name changes covered above), please contact us for further instructions.

You need to take both the original ID and the photocopies.

You'll also **need a separate photocopy for each superannuation fund you are planning to roll over FROM** – so if you're rolling over amounts from three other superannuation funds to the Fund, then you'll need to get three separate photocopies of your ID certified.

## STEP 2

### Ask them to certify your ID

To certify your ID, an authorised person (see Additional Note 1) needs to:

- Compare and check the photocopy to the ORIGINAL
- The certifier must include on EACH page:
  - Written or stamped 'certified true copy'
  - Their signature and printed full name
  - Their qualification (e.g., Pharmacist, Bank employee, Police officer, Australia Post employee, etc.)
  - Date (the date of certification must be within the last 12 months)

See below for an example of how this should appear.

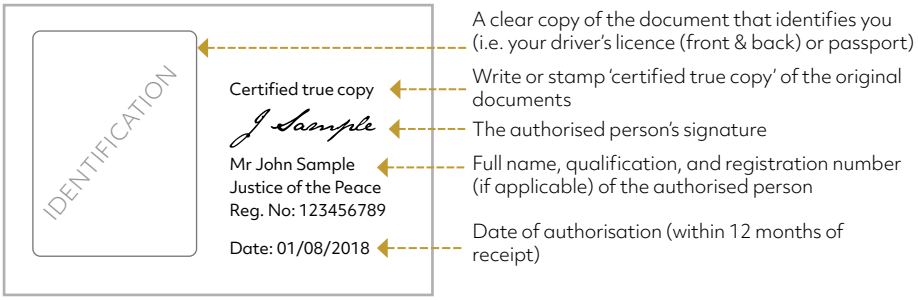
## STEP 3

### Send the documents back to us

Send the signed and certified copies of your ID back to us, attached to your forms(s) (see Additional Note 4).

## ADDITIONAL NOTES

1. **See overleaf for information on who can certify your ID.** There may be a charge for certifying documents, please check directly with the certifier.
2. **There are other documents that can be used to prove your identity** if you do not have, or do not wish to provide, either a current driver's licence or passport. Refer to 'Other documents that can be used to prove your identity' below.
3. **If your identification or other document is not written in English**, the document must be accompanied by an English translation prepared by a translator accredited by the National Accreditation Authority for Translators and Interpreters Ltd (NAATI) at the level of Professional Translator or higher (or an equivalent accreditation), to translate from a language other than English into English.
4. If you are **signing a form on behalf of another person**, you will need to provide the following:
   - A certified copy of the Guardianship papers or Power of Attorney, and
   - A certified copy of the appropriate proof of identity for the holder of the Guardianship or Power of Attorney, and
   - A certified copy of the appropriate proof of identity for the applicant.




## OTHER DOCUMENTS THAT CAN BE USED TO PROVE YOUR IDENTITY

Either **one** of the following (they must include your photo and signature):

- A CURRENT card issued under an Australian State or Territory for the purpose of providing your age
- A CURRENT national identity card issued by a foreign government for the purpose of identification (see Additional Note 3)

OR

If you can't provide any photographic identification, you can provide **two alternative identification documents, one from each of the following lists**:

- Birth certificate or birth extract
- Citizenship certificate issued by the Commonwealth of Australia
- Pension card issued by the Department of Human Services (Centrelink) that entitles the person to financial benefits

AND

- Letter from the Department of Human Services (Centrelink) or other Government body in the last 12 months regarding a Government assistance payment
- Australian Tax Office Notice of Assessment issued in the last 12 months
- Rates notice from your local council issued in the last three months
- Electricity, gas or water bill issued in the last three months
- Landline phone bill issued in the last three months (mobile phone bills are not acceptable)

(The letter, notice or bill must show your name and current residential address)

Contact the Member Services Team if you are unable to provide any of the documents set out above.

# Completing Proof of Identity

GuildPension

## Who can certify documents in Australia?

- **Australia Post permanent employee or agent** (who is currently employed with the post office and has at least two continuous years of service) **or agent** (in charge of 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, building society officer or credit union officer** (with two or more continuous years of service)
- **Commissioner for Affidavits or Declarations**
- **Court Officer, Registrar or Deputy Registrar of a Court, Judge, Clerk, Magistrate, Master of a Court, Chief Executive Officer of a Commonwealth Court**
- **Fellow of the National Tax Accountant's Association**
- **Finance Company Officer** (with two or more continuous years of service)
- **Justice of the Peace**
- **Legal practitioner on the roll of the Supreme Court of a State or Territory, or the High Court of Australia**
- **Marriage celebrant** (registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961)
- **Medical practitioner, chiropractor, dentist, nurse, optometrist, physiotherapist, psychologist**
- **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 Australasian Institute of Mining and Metallurgy**
- **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 two 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 National Institute of Accountants**
- **Member of Commonwealth Parliament, State Parliament, Territory Legislature or a Local Government Authority** (State or Territory)
- **Minister of Religion** (under Subdivision A of Division 1 of Part IV of the Marriage Act 1961)
- **Notary Public**
- **Officer with, or Authorised Representative of, an Australian Financial Services Licensee** (who has had at least two years of continuous service with one or more licensees)
- **Officer with, or a credit representative of, a holder of an Australian credit licence** (who has had at least two years of continuous service with one or more licensees)
- **Permanent employee of the Commonwealth** (or Commonwealth Authority) or a State or Territory (or State or Territory Authority) or a **Local Government Authority** with two or more years of continuous service
- **Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made**
- **Pharmacist**
- **Police Officer, Sheriff or Sheriff's Officer**
- **Teacher employed on a full-time basis at a school or tertiary education institution**
- **Trade marks attorney or patent attorney**
- **Veterinary surgeon**

## Who can certify documents outside of Australia?

- **Authorised staff member of an Australian Embassy, High Commission or Consulate**
- **Authorised employee of the Australian & Investment Trade Commission** who is in a country or place outside Australia and authorised under 3(d) of the Consular Fees Act 1955
- **Authorised employee of the Commonwealth of Australia** who is in a country or place outside Australia and authorised under 3(c) of the Consular Fees Act 1955
- **Member of the Australian Defence Force** who is an officer or a non-commissioned officer with two or more years of continuous service
- **Notary Public from a foreign country. Note: we require that the foreign country is ranked 129 or below in the last Transparency International Corruptions Perception Index** (visit transparency.org for details)

Contact the Member Services Team if you are unable to provide any of the documents set out above.