Request for benefit payment

GuildSuper

Important message: You can remain a member of GuildSuper if you change jobs. All you need to do is log in to your GuildSuper online account and provide us with your new employer's email address. Alternatively you can download and complete a *Choice of Superannuation Fund* form from guildsuper.com.au and give it to your new employer. Call **1300 361 477** if you need assistance.

1. Personal details (please complete all sections and provide your details in BLOCK LETTERS)

Member no. | Date of birth | Gender M/F

Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other (Specify):

Surname | Given name(s)

RESIDENTIAL ADDRESS

Street no. | Street name | Suburb

State | Postcode | Country

POSTAL ADDRESS (if different to Residential address)

Street no./ PO Box | Street name | Suburb

State | Postcode | Country

Phone no. | Mobile no.

Full name, address and date of birth are mandatory information that must be supplied for a benefit payment to be processed.

Tax File Number (Refer to the *Product Disclosure Statement (PDS)* for explanation)

I would like to request a: ☐ **Cash withdrawal** (complete sections 2, 3, 5, 6, 7 & 8) ☐ **Rollover** (complete sections 4, 5, 7 & 8)

In order to release your money we need to identify you. You will need to provide certified documentation to prove you are the person to whom the superannuation entitlements belong.

Name and date of birth changes – see 'Completing Proof of Identity' fact sheet attached for details of what to provide and how to certify documents.

Address changes – attach a copy of a recent bill, mail correspondence or driver's licence that displays your new residential or postal address.

2. Cash withdrawal

How much of your benefit do you wish to withdraw in cash?

☐ Pay full account balance

☐ Pay partial account balance:

$ .00 net/gross of tax

Your withdrawal will be made in the same proportions as your selected investment options.

If you are withdrawing your full account balance, your account with us becomes inactive (unless otherwise notified). Any contributions received after your account is made inactive will remain in the Fund until further instructions are received.

Please note, you can only make a partial withdrawal if at least $6,000 remains in your account.

Note: The ability to pay as cash (and the rate of any applicable tax) may depend upon your residency or citizenship status.

Please indicate your current status by ticking the appropriate box below:

Are you an Australian or New Zealand citizen or an Australian Permanent Resident?

☐ Yes ☐ No

If your payment request is affected by your residency/citizenship status, you will be advised accordingly. Failure to respond to the above question may result in delays in the processing of your payment(s).

How do you wish to withdraw your benefit?
(Cash withdrawal only)

☐ **Pension** – convert your benefit to an income stream through GuildPension*

* If this option is selected a *Product Disclosure Statement* and application forms will be sent to you.

☐ **Lump Sum** – withdraw your benefit in one single amount

Request for benefit payment

GuildSuper

3. Condition of release

If a cash withdrawal is requested, you must satisfy **ONE** of the following circumstances, please indicate which one applies to you.

- ☐ My benefit is an unrestricted non-preserved benefit.
- ☐ My benefit is a restricted non-preserved benefit, to which my employer contributed to the Fund and I have left this employer.
- ☐ My benefit is less than $200 and I have left my employer.
- ☐ I have reached my preservation age, left my employer and permanently retired from the workforce (visit guildsuper.com.au/retirement/plan-your-retirement/your-super-in-retirement to calculate your preservation age).
- ☐ I am aged between 60 and 64 and have left my last employer - date employment ceased:
- ☐ I am at least 65 years old.
- ☐ I am permanently disabled – please attach medical evidence from two independent medical practitioners. One of whom specialises in the illness you have confirming your permanent disability.
- ☐ I am applying for release of benefits under compassionate grounds. Please attach a certified copy of the approval document received from the Australian Tax Office (ATO).
- ☐ I am a non-resident and I have permanently departed Australia to reside overseas – please ensure to attach evidence of this i.e. external statement or expired/cancelled visa. Please ensure a Departing Australia Superannuation Payment (DASP) Application has been made. Refer to ato.gov.au for further information.
- ☐ I am terminally ill – please attach medical evidence from two independent medical practitioners, one of whom specialises in the illness that you have, confirming your terminal illness and that as a result of the illness your death is expected within the next 24 months.

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

- ☐ Rollover full account balance
- ☐ Rollover partial account balance:

$ .00

Your rollover will be made in the same proportions as your selected investment options.

If you rollover your full account balance, your account with us becomes inactive (unless otherwise notified).

Please note, you can only make a partial rollover to another super fund if at least $6,000 remains in your account.

Details of other fund

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

Fund name

Fund phone number

This is a Self Managed Super Fund ☐

Membership/ Account number

Fund ABN

SMSF ESA

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

Fund USI (Unique Superannuation Identifier)s

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

Note: All payments to a Self Managed Super Fund (SMSF) will be paid by EFT. Please provide details within* ***Section 6**.*

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

5. Tax deduction

☐ **Do you want to claim a tax deduction on personal contributions (subject to eligibility)?**

GuildSuper values your loyalty and never wants you to leave and go to another fund. However, if you have made personal after-tax contributions for which you intend to claim a tax deduction and you have to leave us, then you must complete the *Notice of intent to claim or vary a deduction for personal super contributions* form (download from ato.gov.au or log into your online account to submit) and send that to us along with this Request for Benefit Payment form.

If we do not receive the *Notice of intent to claim or vary a deduction for personal super contributions* form before we process your benefit payment or rollover, then you will not be able to claim a tax deduction on the personal contributions you have made up to the benefit payment/rollover date.

Continued over...

Request for benefit payment

GuildSuper

6. Cash Payment or Rollover to SMSF

EFT Payment Details

Financial Institution name | BSB no. | Account no.

Account holder's name

Please provide a copy of a recent SMSF Bank account statement.

7. 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 Section 1?
- ☐ Attached supporting documentation for any change of name, date of birth or address detailed in Section 1?
- ☐ Provided complete payment instructions in Section 2 or 4?
- ☐ Provided a completed Notice of intent to claim or vary a deduction for personal super contributions form if you intend to claim a tax deduction on any personal contributions you have made into the Fund (refer Section 5)?
- ☐ For cash and SMSF payments – provided ETF payment details in Section 6?
- ☐ Signed and dated the form (Section 8)?

Completing Proof of Identity

In order to release your money we need to identify you. You will need to provide certified documentation to prove you are the person to whom the superannuation entitlements belong.

Have you:

- ☐ Attached the correct identification as outlined in the 'Completing Proof of Identity' fact sheet?

Select the identification you have provided:

- ☐ One Primary identification document; or
- ☐ Two alternative identification documents (one from each of the lists specified)
- ☐ Is your identification current? An Australian Passport that has expired within the last two years is acceptable.
- ☐ Is your document correctly certified? Ensure the certifier has included ALL of the necessary information on each page. Please refer to 'Completing Proof of Identity' fact sheet for details.

8. Declaration

I hereby declare that the information provided above is true and correct.

Signature ✗ | Date

Next steps

Send forms and supporting documentation to:
GuildSuper, GPO Box 1088, Melbourne VIC 3001

Need help?

Call the Member Services Team on 1300 361 477 from 8.30am - 5.00pm (AEST/AEDT) Monday - Friday.

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.

11/2026

Completing proof of identity

GuildSuper

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.

STEP 2

Ask them to certify your ID

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

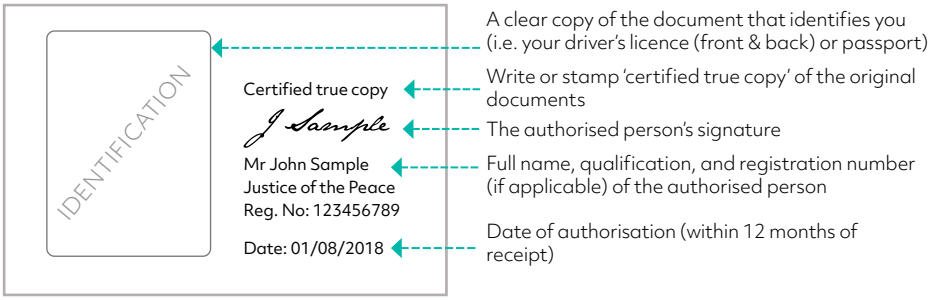
- Compare and check the photocopy to the ORIGINAL
- The certifier must include on EACH page:
  - Written or stamped 'certified true copy'
  - Their signature and printed full name
  - Their qualification (e.g., Pharmacist, Bank employee, Police officer, Australia Post employee, etc.)
  - Date (the date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

GuildSuper

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.