



# Private Super Fund Withdrawal form

Branch name

Branch (BSB) number

 - 

Account number

## Section 5: Rollover details

Please note: you are required to provide proof of identity.

New fund name

Membership number

ABN

 -  -  - 

SPIN

   - A U

New fund address

Suburb

State

Postcode

Proof of identity

I have attached a certified copy of:

- my driver's licence or passport OR  my birth/citizen certificate or Centrelink pension card AND  my Centrelink payment letter or Government or local council notice (less than one year old) with name and address

## Section 6: Financial adviser details

Financial adviser's dealer group

Financial adviser's name

Financial adviser's contact number

## Section 7: Member declaration and signature

I understand that:

- once a Withdrawal Form is submitted to AET all trading, interim payments and other regular withdrawals on my account will be ceased until this withdrawal is completed
- if there is insufficient cash in my cash account to process this withdrawal I understand AET will suspend or cancel my request

Member's signature

Date

 /  /

# Private Super Fund Withdrawal form

## Completing proof of identity

You will need to provide documentation with this closure request to prove you are the person to whom the superannuation entitlements belong.

### Acceptable documentation

Either one of the following documents may be used:

- driver's licence issued under State or Territory law

OR

- passport

Other acceptable forms of identification are either one of the following:

- birth certificate or birth extract
- citizenship certificate issued by the Commonwealth
- pension card issued by Centrelink that entitles the person to financial benefits

AND

- letter from Centrelink regarding a Government assistance payment
- notice issued by Commonwealth, State or Territory Government or local council within the past twelve months that contains your name and residential address For example Tax Office Notice of Assessment or Rates notice from local council

## Have you changed your name or are signing on behalf of another person?

If you have changed your name or are signing on behalf of the applicant, you will need to provide a certified linking document.

A linking document is a document that proves a relationship exists between two (or more) names.

The following table contains information about suitable linking documents.

| Purpose                           | Suitable linking documents   |
|-----------------------------------|--|
| Change of name                    | Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office. |
| Signed on behalf of the applicant | Guardianship papers or Power of Attorney.  |

## Certification of personal documents

All copied pages of ORIGINAL proof of identification documents (including any linking documents) need to be certified as true copies by any individual approved to do so.

The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (eg Justice of the Peace, Australia Post employee, etc) and date.

The following can certify copies of the originals as true and correct copies:

- a permanent employee of Australia Post with five or more years of continuous service
- a finance company officer with five or more years of continuous service (with one or more finance companies)
- an officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having five or more years continuous service with one or more licensees
- a notary public officer
- a police officer
- a registrar or deputy registrar of a court
- a Justice of the Peace
- a person enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia, as a legal practitioner
- an Australian consular officer or an Australian diplomatic officer
- a judge of a court
- a magistrate, or a Chief Executive Officer of a Commonwealth court.

### Please return to Australian Executor Trustees Limited by:

Fax 1800 781 166

Email [forms@aetlimited.com.au](mailto:forms@aetlimited.com.au)

or Post Australian Executor Trustees Limited  
Administration Services  
GPO Box 546  
Adelaide SA 5001

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