

Application to purchase



Super SA



Super SA Income Stream

Please complete all the details on this form in **BLOCK LETTERS** using a **BLACK PEN** and return original signed form to Super SA.

Please note that you are required to consolidate your funds **BEFORE** commencing a Super SA Income Stream. Once opened, additional amounts cannot be added to the account. You may commence a second account, with a minimum amount of \$10,000.

! To find out more visit supersa.sa.gov.au or call (08) 8214 7800

Client ID:



IMPORTANT:

You are required to provide proof of identity documents with this application. Please see the Proof of Identity section at supersa.sa.gov.au for more information.

1. Personal details

Title			Date of birth		
			D D / M M / Y Y Y Y		
Given Name(s)					
Family Name					
Email address					
Mobile phone	Work phone	Home phone			
Street address					
Suburb	State			Postcode	
Postal address (if different from above)					
Suburb	State			Postcode	
When establishing a Spouse Account, please provide spouse details in Section 1 above and Super SA member details below.					
Name of partner (Super SA member)					
Super SA member's Account ID	Date of birth				
	D D / M M / Y Y Y Y				
If the Super SA member currently has a Super SA account, please proceed to Question 2					
OR					
If the Super SA member has been paid out their entitlement, please write the date the payment was received below:					
Date entitlement received:	D D / M M / Y Y Y Y				

2. Tax File Number

Tax File Number -

Providing your TFN will ensure that your entitlement is taxed concessionaly. However, if you choose not to provide your TFN, part of your entitlement will be taxed at the highest marginal rate (currently 47%). Declining to provide your TFN is not an offence.



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3. Directing your Death benefit

You have two options for directing where your income stream is paid in the event of your death.

Option 1 – Reversionary Beneficiary: Nominate your spouse/putative spouse as your reversionary beneficiary to receive your income stream payment in the event of your death. If you want to do this, you must do so now. You cannot do so at a later date.

Please provide details of your nominated reversionary beneficiary.

Surname

Given name(s)

Postal Address

Suburb

State

Postcode

Date of birth

Male

Female

Relationship to you

Option 2 – Legal Personal Representative (Estate): If you would prefer your death benefit to be paid to your Estate, and distributed according to your Will, you can nominate your Legal Personal Representative (Estate). To nominate download the Binding Death Nomination – Legal Personal Representative (Estate) form from supersa.sa.gov.au and return it to Super SA. You can do this now or later.

4. Transfer details

Please indicate from which SA public sector scheme you are transferring your funds:

☐ Triple S ☐ Pension ☐ Super SA Select

☐ Lump Sum ☐ Flexible Rollover Product ☐ Other (please specify):

Lump Sum or Pension Scheme

Please note that you will need to complete an Application for Payment form to transfer your entitlements from your previous scheme.

If your transfer is part of a transition to retirement arrangement, you will need to complete your scheme's Application for Transition to Retirement form.

Triple S, Flexible Rollover Product or Super SA Select

Please note that you will need to complete a Transfer your super form to transfer entitlements from your previous scheme.

These forms are available at supersa.sa.gov.au or by calling Super SA.

When you transfer from an untaxed scheme, such as Triple S, 15% contributions tax will be deducted from the Taxable (untaxed) component. Refer to the Tax information relevant to your previous scheme for further details.

5. Investment options

You can choose to invest your super between any number of the below available investment options. Please indicate the percentage you want to invest in each investment option below using **whole percentages**:

High Growth	<input type="text"/> %	Moderate	<input type="text"/> %	Cash	<input type="text"/> %
Socially Responsible	<input type="text"/> %	Stable	<input type="text"/> %	TOTAL	= 100 %
Balanced	<input type="text"/> %	Capital Defensive	<input type="text"/> %		



If you do not make a choice, your super will be invested 60% in Moderate and 40% in Stable options.

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Government
of South Australia

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5. Investment options (continued)

If you have chosen more than one investment option please indicate the order of options in which you wish to draw down for payment of your income. If you do not specify a choice then your withdrawal will automatically be taken in the order of the investment options specified in the table below.

Default order	Investment Option	Nominated Order	Default order	Investment Option	Nominated Order
1	Cash	<input type="checkbox"/>	5	Balanced	<input type="checkbox"/>
2	Capital Defensive	<input type="checkbox"/>	6	Socially Responsible	<input type="checkbox"/>
3	Stable	<input type="checkbox"/>	7	High Growth	<input type="checkbox"/>
4	Moderate	<input type="checkbox"/>			

! For more information about your investment options and their performance, see the Investment Guide.

6. Income Payment Details

Frequency of payment

Please select your payment frequency (tick one)

☐ Fortnightly ☐ Monthly ☐ Quarterly

☐ Half-yearly ☐ Annually

! For quarterly, half-yearly and annual payments, please specify the month you want to receive your first payment.

Month Year

(If your income stream commences in June you do not need to commence your income stream payments until the next financial year.)

Income stream amount

To calculate your income stream amount please refer to the **About the Super SA Income Stream** section of this PDS.

☐ This Income Stream is being purchased as a transition to retirement income stream (please tick if applicable).

Please select your preferred income stream amount (tick one):

☐ Minimum income amount

☐ Full 10% maximum¹ income amount for this financial year (for transition to retirement only)

☐ Specific amount between the minimum and maximum of \$ per payment (gross)

Please note: If you do not nominate an amount you will be paid the minimum income amount as detailed in the PDS for the financial year.

¹ Not applicable if over age 65 and ceases once you turn age 65.

If you do not nominate a payment frequency your income stream will be paid monthly.

Fortnightly income stream payments will be made on alternate Thursdays. All other payments will be made on the 15th day of the month.

If you choose to receive your payment quarterly, half-yearly or annually and you do not specify which month you want to receive your first payment, the following default commencement dates for your payments will apply:

- Quarterly payments are made on the 15th of September, December, March and June each year
- Half-yearly payments are made on the 15th of December and June each year
- Annual payments are made on the 15th of June each year.



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7. Payment Details

Financial institution details

Please nominate the account into which you want your income stream payments to be paid. Payments cannot be made to third party accounts, credit cards or overseas accounts. Account numbers should not be more than nine digits and must not contain any alphabetic characters. Please contact your financial institution if you need to confirm your banking details.

Required – I have attached a copy of a bank statement showing my full name, BSB and account number that is less than 12 months old.

Name of financial institution

Branch

Account name (account holder name)

BSB number (compulsory)

Account number

[illegible]

8. Financial Adviser Authorisation (Optional)

I authorise my financial adviser to enquire about my Super SA Income Stream details.

I understand that this authorisation will be effective for two years, unless revoked in writing by me before that time.

Financial adviser details

Name

Company name

Street address

Suburb

State

Postcode

Phone

Facsimile

Email

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9. Recipient Declaration

Please tick one of the following:

- ☐ I am age 60 or over and have permanently retired.
- ☐ I have ceased an employment arrangement after the age of 60.
- ☐ I am under age 60 but have retired due to total and permanent disablement.
- ☐ I am aged 65 or over.
- ☐ I am age 60 to 64 but have not retired permanently from the workforce (transition to retirement).
- ☐ I am permanently incapacitated (total and permanent disablement benefit)
- ☐ I am starting a death benefit income stream with the proceeds of a death benefit to which I'm entitled and I was the spouse of the deceased at the date of death.

I hereby apply to purchase a Super SA Income Stream and declare that:

- I understand that the Super SA Income Stream Product Disclosure Statement is a general guide and does not contain financial advice.
- I accept full responsibility for the investment choice(s) I have selected in Section 5 of this form, and I am aware of the consequences of making such an election.
- The information supplied on this form is true and correct.
- I understand that the Super SA Income Stream Product Disclosure Statement represents the terms and conditions under which the Super SA Board offers this Super SA Income Stream. The terms and conditions are subject to any changes in Commonwealth Acts and Regulations.
- I have read the Super SA Income Stream Product Disclosure Statement and I fully understand its contents and accept the terms and conditions set out in it.
- I have provided the required proof of identity documents.

Income Stream Applicant

Signature



Date

D D / M M / Y Y Y Y

You are required to provide proof of identity documents with this application. Please see the Proof of Identity information sheet for more information.

Contact us

EMAIL supersa@sa.gov.au

POST GPO Box 48, Adelaide SA 5001

WEBSITE supersa.sa.gov.au

PHONE (08) 8214 7800

MEMBER CENTRE, Karna Country
Ground floor, 151 Pirie St Adelaide SA 5000
(Enter from Pulteney Street).