Form > Super SA > Lump Sum CATION FOR TRANSITION TO /FN +N



Please complete all the details on this form and return the signed original using a black pen to Super SA with a copy of the Transition to Retirement (Superannuation) Agreement approved by your agency.

1. Personal Details		Important
Account ID		If you have ceased employment with the public sector and wish to apply for the release of your entitlements, do not complete this form. Instead, you need to complete the <i>Application for</i>
Mr Ms Miss Mrs	Dr Prof	Payment of Resignation/Retirement Entitlement form.
Surname		 Once your entitlement is rolled over to a complying income stream fund, the "Taxable (untaxed) component" of the entitlement will be
Given name(s)		taxed at 15%. — When considering Transition to Retirement (TTR) we strongly
Address		suggest you seek financial advice.
		Checklist
		Before Super SA can process your payment you need to complete all sections on this form and provide all requested information.
Postcode Date of birth	/ /	— I have completed my personal details (section 1).
Email*		— 🔲 I have confirmed that I am eligible for TTR (section 2).
Telephone* (W)		— I have attached a copy of the Application for Transition to
(H)		 <i>Retirement and Superannuation Arrangement</i> form approved by my line manager and agency delegate.
(M)		— 🔲 I have supplied Super SA with my tax file number (TFN) (section 3).
Name of agency		— I have provided my payment details (section 4).
Employee no		— I have signed the Member Declaration (section 5).
		My agency's pay office has completed the Salary Certificate on this form (sections 6 & 7).
	N.	2. Tax File Number (TFN)
Contact us Address Ground floor, 151 Pirie Street Adelaide SA 5000 (Enter from Pulteney Street) Postal GPO Box 48, Adelaide, SA 5001 Call (08) 8207 2094 or 1300 369 315 (for regional callers) Email supersa@sa.gov.au	* By providing your email address and/or telephone number(s) you are agreeing to receive, from Super SA, or an organisation on behalf of Super SA, marketing communications including newsletters, announcements, invitations or surveys. You may opt out of these marketing communications at any time by contacting Super SA. If	Providing your TFN will ensure that your entitlement is taxed concessionally. If you choose not to provide your TFN, part of your entitlement will be taxed at the highest marginal rate. Declining to provide your TFN is not an offence.
Website Www.supersa.sa.gov.au	you opt out of marketing communications, you will still receive any important	



account information from us.

LSFM25

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Please complete all the details on this form and return the signed original to Super SA with a copy of the Transition to Retirement (Superannuation) Agreement approved by your agency.

3. Transition to Retirement Eligibility

TTR benefits cannot be paid unless you meet the following conditions (please confirm):

I have reached my Commonwealth Government preservation age

I have a maximum drawdown Benefit of over \$30,000 (See *Transition to Retirement* Fact Sheet)

□ I have entered into a Transition to Retirement Agreement with my agency and I have attached a copy of the approved agreement to this form

I am continuing to work

I will be rolling over to a non-commutable income stream product.

4. Payment Details

I wish to receive the following TTR benefit from my Lump Sum Scheme account :

The maximum drawdown benefit that I am entitled to under TTR arrangements (this is based on the percentage reduction to my salary as a result of the Transition to Retirement Arrangement)

Please note: The amount requested must be greater than \$30,000 and cannot exceed the maximum drawdown benefit. Contact Super SA if you are not sure what your maximum drawdown benefit is.

TTR payments must be forwarded directly to the complying non-commutable income stream fund nominated below.

Super SA Income Stream (Please also complete an Application to Purchase form available in the Super SA Income Stream PDS.)

The non-commutable income stream fund named below:

Name of fund
Fund ABN
New policy/member number
Cheques to be made payable to
Postal address of the fund

Postcode

If you wish to roll over your entitlement to more than one fund, please attach the relevant documentation to this application.

Note: If we are unable to verify that the rollover super fund is a complying non-commutable income stream fund, we will require you to provide a letter of compliance from the fund.



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5. Member Declaration

I certify that the details above are true and correct.

I understand that once my payment has been made I will not be able to change my instructions. I understand that by receiving a TTR benefit the benefit remaining in the Lump Sum Scheme will be reduced accordingly.

🔀 Signature

Date

6. Salary Certificate (to be completed by your payroll section)

Occupation		
Name of Agency		
Pre TTR details		
Position immediately prior to the TTR agreement	Classification	
Fortnightly full time salary \$	Effective from	
Current fraction of time (show 100% if full time)		
Post TTR details		
Date TTR agreement effective		
Position post TTR agreement	Classification	
	Fraction of time (show 100% if full time)	

Was the contributor in receipt of higher duties allowance in an acting position prior to or following the TTR agreement?

No Yes, please provide details:

7. Certification (by authorised officer)

I certify that the member named within this application has entered into a TTR agreement and that the information contained within this Salary Certificate is correct.

✗ Signature of authorised officer

Name of authorised officer (please print)

Date

Contact telephone number