

APPLICATION FOR EARLY ACCESS TO SUPER



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

4. Payment Details

I wish to have the following amount withdrawn from my Triple S account under Early Access to Super:

Please tick one of the following options:

- 100% of my Triple S balance. (Your account will remain active.)
- \$ _____ from my Triple S balance. (Please note: the amount requested must be a minimum of \$30,000 and cannot exceed the amount in the Triple S account.)

Early Access to Super payments will be forwarded directly to the complying non-commutable income stream product you nominate below.

Please tick one of the following options:

- Super SA Income Stream accessible through to Early Access to Super or Transition to Retirement arrangements. (Please also complete an *Application to Purchase* form available in the Super SA Income Stream PDS and provide proof of identity documents.)

- The non-commutable income stream product named below:

Name of rollover fund _____

New policy/member number _____

Rollover fund ABN _____

Rollover fund USI _____

If your fund has no USI then please provide the following information:

Cheques to be made payable to _____

Postal address of rollover fund _____

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 an Early Access to Super benefit I may have a reduced amount of superannuation when I fully retire.

Signature:  _____ **Date:** / / _____

Tax

Once your entitlement is rolled over to a complying income stream, the Taxable (untaxed) component of the entitlement will be taxed at 15%.

Taxable (untaxed) amounts over \$1,515,000 will be taxed at the top marginal rate plus Medicare levy.

Refer to the Triple S *Tax* fact sheet for more information.

Rolling over to more than one fund

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

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

All SMSF (Small Managed Super Funds) payments will be sent c/- the Fund details, as registered with the Taxation Office. Please ensure that this information is up to date.