

# PAYMENT REQUEST FORM

SuperSMA

Issued by Diversa Trustees Limited ("Trustee")  
ABN 49 006 421 638 AFSL 235153  
RSE Licence No L0000635 as trustee for Praemium SMA  
Superannuation Fund (SuperSMA) ABN 75 703 857 864  
RSE Reg R1074352.

Please complete this form to request a full or partial lump sum payment or rollover out from either your accumulation or pension account.

NOTE: If you wish to claim a tax deduction in relation to personal contributions made to your accumulation account, please complete a s290-170 notice prior to requesting a payment or rollover out.

## Part 1 - Member details (please complete all fields)

SuperSMA member number

Street address

Title

Town or suburb

Given name(s)

State

Postcode

Surname

Telephone

Date of birth

Email

For a rollover to another superannuation fund, please proceed to Part 2

For a lump sum cash withdrawal request, please proceed to Part 3

## Part 2 - Rollover to another superannuation fund (if applicable)

Full rollover and account closure

Partial rollover for \$

The minimum balance of \$10,000 must be retained in the account

Fund name

Unique Superannuation Identifier (USI) - non-SMSF only

Your destination member account number

If your rollover is to an SMSF you must include the fund ABN and ESA

SMSF - ABN

SMSF - Electronic Service Address (ESA)

If your rollover is to an SMSF, please complete the Fund bank account details in Part 4.

For rollovers to other institutions, please proceed to Part 6

### Part 3 - Benefit payment amount (if applicable)

You must have provided proof of identity to Praemium in the last 12 months to enable a withdrawal from the superannuation fund. Please select one of the following:

Full withdrawal and account closure

Partial withdrawal for \$

The minimum balance of \$10,000 must be retained in the account

Please complete bank account details in Part 4

### Part 4- Bank account details

Bank account details:

Note: we will only pay a withdrawal to an Australian bank account in the name of the member or SMSF:

Account name

BSB

Account number

For lump sum cash withdrawals please proceed to Part 5

For rollovers to a SMSF, please proceed to Part 6

### Part 5 - Lump sum payment declaration

I declare that I am accessing the benefits entitled to me on the following condition of release:

I am aged 65 years or more; or

I have reached the age 60 and have ceased a paid employment arrangement after the age of 60; or

I have reached the age 60 and never again intend to be gainfully employed for 10 or more hours per week; or

I have reached preservation age and never again intend to be gainfully employed full time or part time (i.e. 10 or more hours per week); or

I have unrestricted non-preserved benefits; or

I am applying for early release of super due to permanent incapacity, compassionate grounds, severe financial hardship or terminal medical condition. (Note: this option requires more information. Please contact the Fund for more details.)

Please proceed to Part 6.

### Part 6 - Member declaration

I approve that fees, taxes or associated costs be deducted from the benefit transferred.

I authorise use of my Tax File Number information understanding that its use and disclosure are strictly regulated by the tax laws and the Privacy Act.

I acknowledge that the Trustee cannot provide me with financial advice about the consequences of the withdrawal of my benefit and that I should consult an appropriately qualified adviser for such advice. I understand that I can request appropriate information that I may reasonably require from the Fund for the purpose of understanding my benefit entitlement, including information about fees and charges that may apply. Upon the closure of my account, I acknowledge there may be a loss of significant benefits and discharge the Trustee from any claims or liabilities in relation to my account.

I declare that I have fully read this form and the information completed is true and correct.

Signature of Member

Date

Name of Member

Please proceed to Part 7.

## Part 7- Financial adviser details

Title

Given name

Telephone

Surname

Email

Please proceed to Part 8

## Part 8 - Completing proof of identity

In accordance with Government guidelines, you must provide proof of identity according to one of the below options to enable a withdrawal from superannuation funds.

All proof of identification documents (including any linking documents) outlined below must be certified as true by an approved individual<sup>1</sup>.

Option One - Provide one of the following only:

- Current driver's licence issued under State or Territory law
- Current passport

OR

Option Two

Provide one of the following:

- Birth certificate or extract
- Citizenship certificate issued by the Commonwealth
- Pension card issued by Centrelink that entitles the person to financial benefits

AND one of the following:

- Letter from Centrelink regarding a Government Assistance payment
- Notice issued by Commonwealth, State or Territory government or local council within the last twelve months that contains your name and residential address

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

If you have changed your name or are signing on behalf of the applicant, you must provide a certified linking document that proves a relationship between two (or more) names. Below are suitable linking documents:

Change of name	Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office.
To sign on behalf of applicant	Guardianship papers or Power of Attorney.

Please select the documents you are enclosing with this request in accordance with the above requirements:

- |   |  |
|---|--|
| Drivers licence issued under State or Territory law     | Guardianship   |
| Passport  | Citizenship certificate issued by the Commonwealth   |
| Change of name – Marriage Certificate/Birth Certificate | Pension card issued by Centrelink that entitles the person to financial benefits                       |
| Court Orders  | Notice issued by the Commonwealth, State or Territory Government or local Council within the 12 months |
| Power of Attorney                                       |  |

## <sup>1</sup>How to certify

The person authorised to sight and certify documents must:

- sight the ORIGINAL and the copy and make sure they are identical, and
- write or stamp 'certified true copy' on all copied pages followed by their signature, printed name, qualification (e.g. Justice of the Peace), registration number (if applicable) and date.
- the documents should be certified within the last 12 months.

## <sup>1</sup>Who can certify my identification document?

For a full listing of people who can certify your documents, see 'Schedule 2 of the Statutory Declarations Regulations 2018'. Some of the people who can certify copies of originals as true copies are:

- a medical practitioner
- a nurse
- an optometrist
- a psychologist
- a pharmacist
- a chiropractor
- a veterinary surgeon
- an accountant (member of ATMA, CA ANZ, CPA or IPA)
- a teacher permanently employed full time or part time basis at a school or tertiary institution
- 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
- a police officer
- a Justice of the Peace
- a magistrate
- a bank officer with 2 or more continuous years of service
- a marriage celebrant
- a member of the Governance Institute of Australia Ltd
- a permanent employee of the Australian Postal Corporation with 5 or more years of continuous service
- a SES employee of the Commonwealth.

## What if I don't certify my identity documents correctly?

If the identification documents you send with your application are not certified or incorrectly certified, you may need to resend certified proof of identity documents. This will lead to delays in processing your instruction.

Please return a copy of this form and applicable certified supporting documents via Adviser Portal upload or via email to [support@praemium.com.au](mailto:support@praemium.com.au).

For any questions or if you need assistance call 1800 571 881 or email [support@praemium.com.au](mailto:support@praemium.com.au).

Please ensure you have enclosed all supporting documents as specified in Part 8. Any incomplete forms or missing documents may cause a delay in the processing of your request. Your benefit payment will be calculated after we have received all the relevant and completed documents.