

# Condition of release

## PremiumChoice Retirement Service



We can only accept your request if the form is correctly completed.

### 1. Your account details

Account number	Customer number (if known)	Contact telephone (business hours)
<input type="text"/>	<input type="text"/>	<input type="text"/>
Title	First name	
Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other <input type="checkbox"/>	<input type="text"/>	
Middle name	Family name	
<input type="text"/>	<input type="text"/>	
Date of birth (DD/MM/YYYY)	Email	
<input type="text"/>	<input type="text"/>	

### Residential address (we can't accept a PO box)

Unit number	Street number	Street name		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
Suburb	State	Postcode	Country	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

### 2. Your tax file number (TFN)

Have you previously provided us with your TFN?

Yes  Please go to **Section 3**.

No  Please write your tax file number in the box provided below.

#### Tax File Number (TFN)

**You don't have to provide your TFN; however, if you quote your TFN your super fund can accept all permitted contributions for you, you won't pay more tax on super contributions and benefits than you need to, and it will be easier to find different super accounts in your name; if you don't quote your TFN, any withdrawals may be taxed at the highest marginal tax rate inclusive of the Medicare levy.**

Your TFN is confidential, and the Trustee is authorised by tax laws to collect your TFN. The Trustee must use your TFN only for lawful reasons. Your TFN may be disclosed to the Trustee or another Fund or RSA provider if your benefits are transferred, unless you request in writing for it not to be disclosed.

Please go to **Section 3**.

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### 3. Your condition of release

Please choose the condition of release you have met. Meeting a condition of release means that your super or pre-retirement benefits will become unrestricted non-preserved and can be cashed at any time. For more information on what moving into retirement phase means for you please refer to the relevant Product Disclosure Statement.

- I have reached my preservation age\* and have permanently retired.
- I am aged 60 to 64 and have left the service of an employer since reaching the age of 60. I have attached documentation from my previous employer confirming the date I ceased employment.

If you have met another condition of release\*, such as permanent incapacity or terminal illness, please call us on **1300 880 054** Monday to Friday between 8.00 am and 6.00 pm (AEST/AEDT) or visit [investinfo.com.au/premiumchoice](http://investinfo.com.au/premiumchoice)

\* For more information on the meaning of preservation age and about conditions of release, please call us or [visit ato.gov.au](http://visit.ato.gov.au)


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### 4. Your agreement and declaration

Before completing this form I have also reviewed the information on the management of my account in the relevant Product Disclosure Statement.

Name of Investor or Attorney

Signature

	Date (DD/MM/YY)				

**If signed under Power of Attorney:** Attorneys must attach a certified copy of the Power of Attorney if not already supplied. The Attorney hereby certifies that he/she has not received notice of any limitation or revocation of his/her Power of Attorney and is also authorised to sign this form.

Power of Attorney documents can't be faxed or emailed.

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### 5. Send us your form

Please scan and email your completed, signed and dated form to us at [premiumchoice@investinfo.com.au](mailto:premiumchoice@investinfo.com.au), fax to **9869 1595** or you can mail it to:

**PremiumChoice Client Services**  
**GPO Box 1610**  
**MELBOURNE VIC 3001**

If you have any questions, please speak with your financial adviser, call us on **1300 880 054** Monday to Friday between 8.00am and 6.00pm (AEST/AEDT) or visit [investinfo.com.au/premiumchoice](http://investinfo.com.au/premiumchoice)