

# 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 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.

### 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 (optional)  
Gender:    Male    Female

### Part 2 - Rollover to other institutions (if applicable)

Full rollover and account closure  
Partial rollover for \$  
Fund name  
Street address  
Fund USI  
Town or suburb  
Your destination member account number  
State  
Postcode

If your rollover is to an SMSF please proceed to Part 3. For any other rollovers proceed to Part 7.

### Part 3 - Rollover to an SMSF (if applicable)

Full rollover and account closure  
Partial rollover for \$  
SMSF name  
SMSF address  
SMSF ABN  
Town or suburb  
**Note:** Transfers to SMSFs will not be processed until we have received a certified Extract of Trust Deed and a copy of a SMSF Bank Statement.  
State  
Postcode

Please complete bank account details in Part 5.

#### Part 4 - Benefit payment amount (if applicable)

In accordance with Government guidelines, you must provide proof of identity to enable a withdrawal from superannuation funds. Please select one of the following:

Full withdrawal and account closure

Partial withdrawal for \$

Gross of taxes and fees

Net of taxes and fees

Please complete bank account details in Part 5 and declaration in Part 6.

#### Part 5 - 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

If you are requesting a rollover to an SMSF please proceed to Part 7.

#### Part 6 - 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 7.

#### Part 7 - 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 or rollover to an SMSF. **All proof of identification documents (including any linking documents) outlined below must be certified as true by an approved individual.**

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                                       |  |

### Part 8 - 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.

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

Signature of Member

Date

Name of Member

### Part 9 - Financial adviser details

Title

Given name

Telephone

Surname

Email

Please email completed form and applicable certified supporting documents to **support@praemium.com.au**

For any questions or if you need assistance call 1800 571 881 or email support@praemium.com.au.

**Please ensure you have enclosed all supporting documents as specified in Part 7. 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.**