Australian Government

Commonwealth Superannuation Corporation

CSCri

CSC retirement income

RI03
09/16

Make a lump sum withdrawal or rollover

For a standard retirement income stream

Use this form if you have a **standard retirement income stream** and wish to:

> make a cash lump sum withdrawal from your CSCri account
> roll over a partial or full amount to another complying superannuation fund.

Please complete this form using **BLACK** ink, in clear BLOCK LETTERS, and mark answers in boxes with an X.

Partial withdrawals and rollovers

Your minimum lump sum payment (for lump sum withdrawals and partial rollovers) is $5,000 or your entire CSCri account balance if there is less than $5,000 in your account. To confirm how much you can withdraw or roll over, please call us on **1300 736 096** during business hours.

Full withdrawals and rollovers

You can only withdraw your total balance as a lump sum cash payment or full rollover to another super fund if your minimum income stream payments for the current financial year have been met.

Before you complete this form

> Contact us on **1300 736 096** during business hours to:
  > confirm how much you can withdraw or roll over from your CSCri account
  > receive a pre-payment statement detailing the tax components of your withdrawal and/or rollover
> Read your **CSCri Product Disclosure Statement (PDS)** available at **cscri.gov.au**
> Speak to a licensed financial planner to receive advice for your own objectives, financial situation and needs. The Commonwealth Superannuation Corporation (CSC) has partnered with Industry Fund Services to make an advice service available to you. To find out more, please visit **csc.gov.au/advice**. To book your first appointment please call **1300 277 777** during business hours.

Section A – Confirm your personal details

Member number

Personal information (as currently displayed on your CSCri account)

Title ☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other

Surname

Given name(s)

Date of birth D D / M M / Y Y Y Y

Residential address

SUBURB STATE POSTCODE

Your Government Super at Work

Any financial product advice in this document is general advice only and has been prepared without taking account of your personal objectives, financial situation or needs. Before acting on any such general advice, you should consider the appropriateness of the advice, having regard to your own objectives, financial situation or needs. You may wish to consult a licensed financial advisor. You should obtain a copy of the **CSCri Product Disclosure Statement (PDS)** and consider its contents before making any decision regarding your super.

Commonwealth Superannuation Corporation (CSC) ABN: 48 882 817 243 AFSL: 238069 RSEL: L0001397
Commonwealth Superannuation Corporation retirement income (CSCri) is offered by CSC,
the trustee of the Public Sector Superannuation accumulation plan (PSSap) ABN: 65 127 917 725 RSE: R1004601
Industry Fund Services (IFS) ABN 54 007 016 195 AFSL 232514

Section B – Nominate your withdrawal or rollover option

I wish to: *(please choose ONE option only)*

- ☐ Make a partial lump sum withdrawal only (cash payment to me)
  Go to **Section C**
- ☐ Make a full lump sum withdrawal only (cash payment to me) and close my CSCri account
  Go to **Section C**
- ☐ Make a partial rollover to another complying superannuation fund only
  Go to **Section D**
- ☐ Make a full rollover to another complying superannuation fund only and close my CSCri account
  Go to **Section D**
- ☐ Make a partial lump sum withdrawal (cash payment to me) and full rollover (of my remaining balance) to another complying superannuation fund
  Go to **Sections C** and **D**

Section C – Provide your withdrawal payment details

Lump sum withdrawal amount

Make my lump sum payment to me as follows:

Indicate your amount below by selecting ONE box only.

☐ My full CSCri balance
Note: Your CSCri account will close after your withdrawal.

OR

☐ The following partial amount

$ ☐☐☐☐☐☐☐.00

Payment method

I wish to receive my lump sum withdrawal as:

- ☐ Electronic payment into the same bank account used for my regular income stream payments
- ☐ Cheque sent to the postal address nominated on my CSCri account
- ☐ Electronic payment into my bank account as follows:

Name(s) in which your account is held

Name of your bank/financial institution

Account number

BSB

Note: Your benefit can only be deposited into an account held in your name or jointly in your name. Any Australian financial institution with a BSB number will be accepted. We will not be liable for any errors that occur based on the account details you provide.

If the electronic payment to the above account is unsuccessful, we will issue a cheque payable to you and send it to the postal address we hold for your CSCri account.

***Section C** continued on next page*

Investment option payment amount (for partial withdrawals only)

Complete this part of the form to indicate from which investment option or mix of options your partial lump sum amount is to be withdrawn. You should only complete this part if you wish to make a partial withdrawal and your CSCri account balance is currently invested in two or more investment options.

Cash	$. 0 0
Income Focused (default option)	$. 0 0
Balanced	$. 0 0
Aggressive	$. 0 0
Total	**$. 0 0**

Please ensure your total amount is the same as the lump sum withdrawal amount you listed above.

Section D – Provide your rollover payment details

Rollover amount

Roll over my CSCri account balance to another complying superannuation fund as follows:

Indicate your amount below by selecting ONE box only.

☐ My full CSCri balance (full rollover)

Note: Your CSCri account will close after your withdrawal.

OR

☐ The following partial amount (partial rollover)

$. 0 0

Note: To find out how much you can roll over, please call us on **1300 736 096**.

Your other superannuation fund

Fund name

Phone

Postal address

SUBURB STATE POSTCODE

Your membership number

Unique Superannuation Identifier (USI)

Australian Business Number (ABN)

Cheque made payable to:

***Section D** continued on next page*

Investment option payment amount (for partial rollovers only)

Complete this part of the form to indicate from which investment option or mix of options your partial rollover amount is to be withdrawn. You should only complete this part if you wish to make a partial rollover (not a full rollover) and your CSCri account balance is currently invested in two or more investment options.

Cash	$. 0 0
Income Focused (default option)	$. 0 0
Balanced	$. 0 0
Aggressive	$. 0 0
Total	**$. 0 0**

Please ensure your total amount is the same as the partial rollover amount you listed above.

Section E – Declaration

By signing this request form I am making the following statements:

- I have read and understood the **CSCri PDS**
- I declare that, to the best of my knowledge, the information I have provided on this form is true and correct
- I authorise CSCri to transfer and/or pay my benefit as instructed on this form
- I discharge the Commonwealth Superannuation Corporation, the trustee of PSSap through which CSCri is offered, from all further liability in respect of the benefits transferred and/or paid
- I am aware that personal information I or a third party provide, such as my employer, is collected, held, used and disclosed as required or authorised by law in accordance with the privacy policies and notice, available via **cscri.gov.au** or by contacting us on **1300 736 096**, for the purpose of managing my super. This includes the management of superannuation investments, providing me with superannuation products and information, the administration of my account, conducting market research and product development. The privacy policies and notice contain important information about how personal information is handled, including rights to access and update that information and how a complaint about a breach of privacy can be made.

SIGNATURE

Date signed

D D / M M / Y Y Y Y

Please send your completed form to:

CSCri
Locked Bag 8840
Wollongong NSW 2500