

Transfer to Retirement Income Account Form

ALL SECTIONS MUST BE COMPLETED

PLEASE ☒ NOT ☒

PLEASE USE BLOCK LETTERS



Please complete this form if you wish to transfer your Transition to Retirement Account to a Retirement Income Account.

ARE YOU A MEMBER OF CLUB SUPER?

☐ YES ☐ NO

If YES, Member No:

PERSONAL DETAILS

Date Of Birth

Gender

Title

☐ Mr ☐ Mrs ☐ Miss ☐ Other

Specify if Other

First Name

Middle Name

Family Name

Note: if you have changed your name since first becoming a member please attach a certified copy of your Marriage Certificate, Deed Poll or a Statutory Declaration as proof.

Home Address

Street Number

Street Name

Suburb/Town

State

Postcode

Postal Address (If Same As Above, Write "As Above")

Street Number

Street Name

Suburb/Town

State

Postcode

Contact Details

Email

Phone

Mobile

DECLARATION

Please select one of the following:

- ☐ I have reached preservation age and permanently retired from the workforce.
- ☐ I have reached age 60 and ceased employment with my employer.
- ☐ I have reached age 65.
- ☐ I have been assessed as Totally and Permanently Disabled.

Date of Birth	Preservation Age
Before 1 July 1960	55
1 July 1960 – 30 June 1961	56
1 July 1961 – 30 June 1962	57
1 July 1962 – 30 June 1963	58
1 July 1963 – 30 June 1964	59
After 1 July 1964	60

I have read this form and I declare that the information I have provided in it is true and correct to the best of my knowledge and belief.

I understand that by signing this form, I am requesting to have the full balance of my existing Transition to Retirement Account transferred to a Retirement Income Account. I have read the *Club Income Stream PDS* (which is available from our website clubsuper.com.au or by calling us on **1300 369 330**) and the *Important Information About Your Transition To Retirement Income Stream Account* enclosed with this form and understand the effects of transferring to a Retirement Income Account, including the \$1.6 million transfer balance cap.

Your privacy is important to us

When your personal details are provided to Club Super, they are securely stored and accessible only to authorised personnel and third parties for the purpose of administering your account. If you would like to see Club Super's Privacy Policy visit clubsuper.com.au or call us on **1300 369 330** for a copy of the Privacy Policy.

Signature

SIGN HERE

Date

PLEASE ENSURE YOU HAVE COMPLETED ALL RELEVANT SECTIONS OF THIS FORM.

RETURN COMPLETED FORM TO: CLUB SUPER PO BOX 10726 BRISBANE ADELAIDE STREET QLD 4000

OR EMAIL A SCANNED COPY OF THE COMPLETED FORM TO: info@clubsuper.com.au