

State or Police Account Preservation Claim

When to use this form

If you have a preserved State or Police account, please fill out this form if you would like to transfer your benefit to an Accumulation account, make a withdrawal, or transfer your benefit to another complying super fund. If you want to open a Transition to Retirement Income account, Retirement Income account, or purchase a Lifetime Pension, you will also need to complete the Open an Income Account and/or Lifetime Pension form, at the back of the Product Disclosure Statement for Income Account and Lifetime Pension, available at qsuper.qld.gov.au/pds

Important information

If you are under age 55 and choose to withdraw or transfer your cash value, you will lose employer contributions that are over the minimum required under Commonwealth superannuation legislation. To keep your full benefit, you need to keep it in your State or Police account until age 55 or transfer it to a QSuper Accumulation account. If you transfer your account to a QSuper Accumulation account before age 55 none of your benefit can be withdrawn as cash until retirement, including your personal contributions and interest paid before 1 July 1999.

Before completing this claim form, please read the Product Disclosure Statement for Accumulation Account, Product Disclosure Statement for Income Account and Lifetime Pension, State Account Guide, Police Account Guide (whichever applies to your situation), the Tax Explanation factsheet, and the Proving Your Identity factsheet.

Please complete in **BLOCK** letters, using blue or black ink.

1 Personal details

Client number

Your client number can be found by logging in to Member Online or on your annual statement.

Title First name/s

Last name

Previous name¹ (if we know you by another name)

Date of birth (dd/mm/yyyy) Home phone number

Mobile phone number Work phone number

Email address

Residential address

Postal address State Postcode
As above

State Postcode

¹ If your name has changed and you work for the Queensland Government or default employer, let your payroll office know and they will then let us know. Otherwise, please send us a certified copy of either a marriage certificate or other legal change of name document.



Part of Australian Retirement Trust

Australian Retirement Trust Pty Ltd (ABN 88 010 720 840, AFSL 228975)
is the trustee of Australian Retirement Trust (ABN 60 905 115 063).

2 Reason for withdrawal or transfer

Withdrawal option – I have reached age 55 and want to transfer my State or Police account, and/or make a cash withdrawal.

Preserved option – I am under age 55 and want to:

withdraw my cash value (your cash value is your personal contributions and interest paid before 1 July 1999)

OR

transfer my State or Police account to a QSuper Accumulation account.

Please note: If you are under age 55 and choose to withdraw or transfer your cash value, you will lose employer contributions that are over the minimum required under Commonwealth superannuation legislation. If you are under age 55 and choose to transfer your State or Police account to a QSuper Accumulation account, none of your benefit can be withdrawn as cash until retirement, including your personal contributions and interest paid before 1 July 1999. You can find more information about this in our State Account Guide, or Police Account Guide, available on our website at qsuper.qld.gov.au or call us to request a copy.

3 Withdrawal options

Option 1 – Transfer to an Accumulation account

You should choose this option if you want to transfer some or all of your State or Police account to a QSuper Accumulation account. If you are under age 55, it must be all of your account. If you have reached age 55, it can be all or some of your account.

\$ OR %

Accumulation account insurance

If eligible, would you like to receive the default level of insurance cover with your Accumulation account?

Yes

No

Investing in the Accumulation account

Tell us how you would like your transferred balance invested in your Accumulation account.

Invest my transferred funds according to my current investment preference otherwise, we will automatically pay into the default investment option, Lifetime. **Go to section 4.**

OR

Invest my transferred balance in the following way:

Investment option	Allocation	Investment option	Allocation
Lifetime	<input type="text"/> %	Cash	<input type="text"/> %
Moderate	<input type="text"/> %	Diversified Bonds	<input type="text"/> %
Balanced	<input type="text"/> %	International Shares	<input type="text"/> %
Socially Responsible	<input type="text"/> %	Australian Shares	<input type="text"/> %
Aggressive	<input type="text"/> %	Total (must add up to 100%)	<input type="text"/> %

Option 2 – Withdraw a lump sum from your benefit

You should choose this option if you want to withdraw some or all of your money.

Amount you want to withdraw (net):

\$ OR %

Pay the money into the bank account below:

We can only make payments into an Australian bank, credit union, or building society account that's in your name or a joint name. This means we can't make payments into a business, trust, or loan account.

Bank name

Branch (BSB) number

Account number

Account name (e.g. John & Jane Citizen)

If you provide incorrect details, there could be a delay in your payment or a loss of interest, and we cannot accept responsibility for this.

Option 3 – Transfer my benefit to another complying superannuation fund

You should choose this option if you want to transfer some or all of your State or Police account to another complying superannuation fund.

Amount you want to transfer:

\$ OR %

Please select the type of superannuation fund you're transferring to and provide us with the necessary account information.

Transfer to an approved registered super fund

Fund name	Product name
<input type="text"/>	<input type="text"/>
Client/account number	Fund phone number
<input type="text"/>	<input type="text"/>
Fund USI/SPIN	Fund ABN
<input type="text"/>	<input type="text"/>

The fund **Unique Superannuation Identifier (USI)** can be found on the other fund's website and might be called a SPIN. **We may not be able to process your request without this.**

OR

Transfer to a self-managed super fund (SMSF)

Self-managed super fund (SMSF) name

Australian business number (ABN)

Electronic service address (ESA)

Branch (BSB) number

Account number

Please attach to this form a **copy of a bank statement for the SMSF account** listed above, no older than 6 months.

To proceed with this request, the name of the bank account provided must match the details for your registered SMSF at the Australian Taxation Office (ATO).

I want to transfer my money to a self-managed super fund (SMSF), and I confirm that I am a member, trustee or director, or a corporate trustee of the SMSF.

! Transferring to SMSF

We can't process your transfer to your SMSF if you have not provided an electronic service address (ESA) for your SMSF. For more information on this requirement, visit ato.gov.au/Super/Self-managed-super-funds/Setting-up/Get-an-electronic-service-address/

If you are not making a lump sum withdrawal or transferring to an SMSF, please go to section 5.

4 Proving your identity

You can prove your identity by either:

Option 1 – Electronic identification

(not available for people currently living overseas)

To prove your identity electronically, please provide us with your driver's licence or passport number.

From here, we will provide your name, address, and date of birth to a credit reporting agency (CRA) to check if your personal information matches your credit information file with the CRA. This will allow us to verify you under the Anti-Money Laundering and Counter-Terrorism Financing Act 2006 before making your payment. It doesn't give us access to other information about you, our request won't be recorded on your credit information file, and the CRA can't use it for anything else. If we cannot identify you in this way, we will write to you advising the name of the CRA and another way to verify your identity.

I confirm that I am authorised to provide the personal details presented and I consent to my information being checked with the document issuer or official record holder.

Driver's licence number	State of issue
<input type="text"/>	<input type="text"/>

If using your driver's licence as proof of identity, please also give us your driver's licence card number, which is different to your licence number.

Driver's licence card number

OR

Passport number	Previous name
<input type="text"/>	<input type="text"/>

Country of birth

OR

Option 2 – Certified identification

You can post, email, or fax us certified copies of your identification document as explained in the Proving Your Identity factsheet on our website.

5 Declaration and authorisation

- I confirm I am the person named on this form, or have a power of attorney to act on the member's behalf.²
- The information I have given on this form is true and correct.
- I understand that if there is a surcharge debt I need to pay on my benefit, the Trustee will deduct this before my money is withdrawn.
- I understand additional tax may be withheld if I have not previously provided the Trustee with my Tax File Number (TFN).

Signature

(Please sign in blue or black pen – We do not accept electronic signatures on this form.)

Date signed (dd/mm/yyyy)

Where to send this form

Please send your completed form to us by:

Post

QSuper
GPO Box 200
Brisbane QLD 4001

Email

qsuper@qsuper.qld.gov.au

Checklist

Please use the below checklist to help make sure you give us all the information we need to process your request.

If you are proving your identity using the paper method, please attach certified copies of your identity documents as explained in the Proving Your Identity factsheet at qsuper.qld.gov.au/factsheets

If we know you by another name, please attach certified copies of your marriage certificate or another legal change of name document.

If you're signing as a power of attorney and you haven't already given us a certified copy of your power of attorney documentation, please attach it to this form. You must also attach certified copies of your and the member's identification documents.

If you have not previously provided your Tax File Number (TFN) and wish to supply this, please update via Member Online or by completing the Tax File Number notification form available on our website. To protect your privacy, please do not write your TFN on this form.

Once we have all the information we need, we will do our best to process your request within seven working days of receiving your form. In busy periods, this may take longer.

² If you have not already done so, you need to give us an original certified copy of the power of attorney document.

Member Centres

Visit qsuper.qld.gov.au/membercentres for locations

Member Services team

Phone 1300 360 750
Overseas +61 7 3239 1004
Monday to Friday 8.00am – 6.00pm (AEST)

Postal address GPO Box 200, Brisbane QLD 4001
Email qsuper@qsuper.qld.gov.au
Fax 1300 242 070
Website qsuper.qld.gov.au

This form and all QSuper products are issued by Australian Retirement Trust Pty Ltd (ABN 88 010 720 840, AFSL 228975) as trustee for Australian Retirement Trust (ABN 60 905 115 063). Any reference to "QSuper" is a reference to the government division of Australian Retirement Trust. This is general information only, so it does not take into account your personal objectives, financial situation, or needs. Before acquiring or continuing to hold any financial product, you should consider whether the product is right for you by reading the relevant product disclosure statement (PDS). The PDS and Target Market Determination (TMD) for QSuper products are available at qsuper.qld.gov.au/pds or call us on 1300 360 750 to request a copy. Where necessary, consider seeking professional advice tailored to your individual circumstances. We are committed to respecting your privacy. We are collecting your personal information to set up and/or to administer your superannuation account. We may also disclose this information to third parties if we need to, if you have given consent to the disclosure, or if we are required to by law. If you want to know more about our privacy policy, including how we collect, hold, use, and disclose personal information, or how individuals can access or correct their information, visit qsuper.qld.gov.au/privacy or call us to request a copy.