

Income Stream Withdrawal Request

Please send this completed form to:

Mercy Super
PO Box 8334, WOOLLOONGABBA QLD 4102

Contact Details

Phone: 1300 368 891 or (07) 3163 8867
Email: information@mercysuper.com.au

Your member number

Surname

Dr/Mr/Mrs/Miss/Ms

Given names

Date of birth

 / /

Residential Address

Suburb

State

Postcode

Contact Details

Email

Telephone

Mobile

Please tick ✓ the Option Chosen:

1. I wish to have \$ (before any taxation) paid to me as an Income Stream Payment

Please add this to my annual income amount.

Please include this in my current annual income amount.

Please note income stream payments are processed each Wednesday.

2. I wish to have \$ (before any fees and taxation) paid to me as a lump sum.

Please note: this amount will be paid to the bank account you have nominated to receive your income stream payments unless you specifically request payment by cheque.

3. I wish to transfer my Income Stream back to an Accumulation account with Mercy Super.

Special Instructions: _____

Proof of identity* (see overleaf for details) (✓ please tick)

I have attached a certified copy of my Driver's Licence or Passport

OR

I have attached certified copies of both:

Birth/Citizenship Certificate or Centrelink Pension Card **AND**

Centrelink payment letter or Government or local council notice showing name and address.

Declaration

I am aware that I may ask the Trustee of Mercy Super for all information that I need to understand my benefit entitlements and I do not require any further information.

I discharge the Trustee from any future liability in respect of the benefits paid.

I authorise the Trustee to deduct the appropriate amount of tax and any withdrawal fee applicable.

I certify that all information given on this form is true and correct in every detail and I authorise the Trustee to update its records accordingly.

Signature

Date

 / /

Important information regarding identification requirements

Completing Proof of Identity

You will need to provide documentation with this request to prove you are the person to whom the superannuation entitlements belong.

The following documents may be used:

EITHER

One of the following documents:

- Driver's licence issued under State or Territory law
- Passport.

OR

One of the following documents:

- Birth certificate or birth extract
- Citizenship certificate issued by the Commonwealth
- Pension card issued by Centrelink that entitles the person to financial benefits.

AND

One of the following documents:

- A notice issued by a Commonwealth, State or Territory within the preceding 12 months that contains your name and residential address and records the provision of financial benefit. For example:
 - Centrelink benefits
- A notice issued by the ATO within the past 12 months that contains your name and residential address. For example:
 - Tax Office Notice of Assessment
- A notice issued by a local government body or utilities provider within the preceding three months that contains your name and residential address. For example:
 - A Rates Notice.

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 will need to provide a certified linking document. A linking document is a document that proves a relationship exists between two (or more) names. These include Marriage Certificate, Deed Poll or Change of Name Certificate from Births, Deaths and Marriages Registration Office, Guardianship papers or Power of Attorney.

Certification of personal documents

All copied pages of ORIGINAL proof of identification documents (including any linking documents) need to be certified as true copies by any individual approved to do so.

The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (eg Justice of the Peace, Australia Post employee, etc) and date.

Privacy information

Information on this form will be handled by the Fund to process your benefit payment. It may be disclosed to your employer, government agencies and other parties as required, including the trustee of any other fund you may transfer to. By signing this form you consent to this handling of your personal information. If you do not provide the information we may not be able to make payment as requested. You may access your personal information by contacting the Fund's Privacy Officer.

Persons who can certify identification documentation

The persons listed below can certify member's customer identification documentation:

- a person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner (however described)
- a judge of a court
- a magistrate
- a chief executive officer of a Commonwealth court
- a registrar or deputy registrar of a court
- a Justice of the Peace
- a notary public
- a police officer
- an agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- a permanent employee of the Australian Postal Corporation with 2 or more years of continuous service who is employed in an office supplying postal services to the public
- an Australian consular officer or an Australian diplomatic officer (within the meaning of the Consular Fees Act 1955)
- an officer with 2 or more continuous years of service with one or more financial institutions (for the purposes of the Statutory Declaration Regulations 1993)
- a finance company officer with 2 or more years of continuous service with one or more finance companies (for the purposes of the Statutory Declaration Regulations 1993)
- an officer with, or authorised representative of, a holder of an Australian financial services licence, having 2 or more continuous years of service with one or more licensees
- a member of the Institute of Chartered Accountants in Australia, CPA Australia or the National Institute of Accountants
- Chiropractor
- Dentist
- Legal practitioner
- Medical practitioner
- Nurse
- Optometrist
- Patent attorney
- Pharmacist
- Physiotherapist
- Psychologist
- Trade marks attorney
- Veterinary surgeon
- Bailiff
- Clerk of a court
- Commissioner for Affidavits
- Commissioner for Declarations
- Employee of the Australian Trade Commission who is:
 - (a) in a country or place outside Australia; and
 - (b) authorised under paragraph 3 (d) of the *Consular Fees Act 1955*; and
 - (c) exercising his or her function in that place
- Employee of the Commonwealth who is:
 - (a) in a country or place outside Australia; and
 - (b) authorised under paragraph 3 (c) of the *Consular Fees Act 1955*; and
 - (c) exercising his or her function in that place
- Fellow of the National Tax Accountants' Association
- Holder of a statutory office not already specified in one of the other items listed
- Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the *Marriage Act 1961*
- Master of a court
- Member of Chartered Secretaries Australia
- Member of Engineers Australia, other than at the grade of student
- Member of the Association of Taxation and Management Accountants
- Member of the Australian Defence Force who is:
 - (a) an officer; or
 - (b) a non-commissioned officer within the meaning of the *Defence Force Discipline Act 1982* with 5 or more years of continuous service; or
 - (c) a warrant officer within the meaning of that Act
- Member of:
 - (a) the Parliament of the Commonwealth; or
 - (b) the Parliament of a State; or
 - (c) a Territory legislature; or
 - (d) a local government authority of a State or Territory
- Minister of religion registered under Subdivision A of Division 1 of Part IV of the *Marriage Act 1961*
- Permanent employee of:
 - (a) the Commonwealth or a Commonwealth authority; or
 - (b) a State or Territory or a State or Territory authority; or
 - (c) a local government authority; with 2 or more years of continuous service who is not already specified in one of the other items listed
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- Senior Executive Service employee of:
 - (a) the Commonwealth or a Commonwealth authority; or
 - (b) a State or Territory or a State or Territory authority
- Sheriff
- Sheriff's officer
- Teacher employed on a full-time basis at a school or tertiary education institution
- Member of the Australasian Institute of Mining and Metallurgy.

FUND USE ONLY

Processed by:

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Checked by:

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