Defined Benefit: under 55

Use this form to keep your benefit with ElectricSuper even after you leave your electricity supply industry employer.

1. Your details

Title: ☐ Mr ☐ Ms ☐ Mrs ☐ Other

Date of birth (dd/mm/yyyy)

Your division

☐ Division 2: Lump Sum Scheme ☐ Division 4: RG Scheme

Given name(s)

Surname

Any other names known by (eg. also known as/a former name/an anglicised name)

Residential address (required)

Suburb/Town State Postcode

Postal address (if different)

Unit number Street number Street name

Suburb/Town State Postcode

Telephone (business hours) Mobile

Email address

Secondary email address

Membership number Occupation

Date left employer (dd/mm/yyyy)

Industry of your occupation:

☐ Electricity supply ☐ Other (please specify)

2. Employment Declaration

This is a declaration by you to allow the Board to determine whether or not you are transferring your employment to another employer who participates in ElectricSuper. If you are taken to have 'transferred' your employment in this way, the ElectricSuper Rules do not allow you to be paid a benefit from ElectricSuper at this time. If the Board determines to pay you a benefit based upon your responses to the questions below, the declaration also operates to release the Board from further claims by you or your dependants.

1. I have entered into a new employment arrangement with a new employer who participates in the electricity supply industry in South Australia or elsewhere, within 30 days of departing my previous employer ☐ Yes ☐ No
2. I have been identified as surplus to requirements and have elected to transfer employment to the South Australian Government (including all South Australian Government organisations) ☐ Yes ☐ No
3. Are there any circumstances that would cause the Board to classify me as having transferred my employment? ☐ Yes ☐ No
4. I do consider that I have transferred my employment ☐ Yes ☐ No

   You can read information about what "transferring employment" means on our website at www.electricsuper.au/resources/learning-hub/super-hints/defined-benefits/transferring/

If you are unsure how to answer these questions, please contact ElectricSuper on 1300 307 844.

3. Roll to Division 5

Do you wish to rollover your account balance to Division 5 where it will be preserved until at least age 55?

☐ Yes

☐ No *If no, move to section 4*

Investment choice

Invest my retained Division 5 balance:

☐ % in High Growth

☐ % in Balanced Growth

☐ % in Conservative Growth

☐ % in Cash

100 **% Total**

Your account balance will fluctuate in line with investment earnings earned in your chosen investment option or options until you claim your benefit on retirement (or when you meet another condition of release). See our website for more information about investment options.

If you do not make a choice, your super will be invested in the Balanced Growth option.

Do you wish to "continue" insurance in your new Division 5 account? ☐ Yes ☐ No

If you want insurance cover to "continue" within your new Division 5 account, you must complete and return this form within 60 days of leaving your employment with your participating electricity industry employer.

4. Stay in Division 2 or 4

Do you wish to preserve (retain) your account balance in Division 2 or 4 where it will be preserved until at least age 55?

If you choose this option, you will not be able to access your benefit until at least age 55, including not being able to roll your benefit to another super fund.

☐ Yes

☐ No *If no, move to section 5*

Investment choice

Invest the **voluntary contributions and rollovers** that make up part of my retained Division 2 or 4 balance:

☐ % in High Growth

☐ % in Balanced Growth

☐ % in Conservative Growth

☐ % in Cash

100 **% Total**

Invest **any other accounts** that make up part of my retained Division 2 or 4 balance (such as my Member Account):

☐ % in Balanced Growth

☐ % in Cash

100 **% Total**

Making a choice

Note: The employer component of your benefit will be subject to indexation only.

Your account balance will fluctuate in line with investment earnings earned in your chosen investment option or options until you claim your benefit on retirement (or when you meet another condition of release). See our website for more information about investment options.

If you do not make a choice, your super (across all your ElectricSuper accounts) will be invested in the Balanced Growth option.

5. 'Cash Plus Rollover' Preserved option withdrawal

Do you wish to make a withdrawal from your Cash Plus Rollover Preserved Option

☐ Yes

☐ No *If no, move to section 7*

How much do you wish to roll to your other super account? $ ☐ net of tax

or

☐ the total of my account (tax may be applicable)

My BSB ☐

My account number ☐

My account name *(an account in your name or a joint account where you are one of the account holders)* ☐

Name of financial institution ☐

Remember! You must provide proof of identity to receive a payment (complete Section 6 of this form). This could be electronic ID or Certified ID. Refer to the Identification (ID) requirements flyer at the end of this form.

5. 'Cash Plus Rollover' Preserved option withdrawal (continued)

I understand that my preserved benefit will be rolled to Division 5 and retained until age 55 and any unpreserved amount will be accessible to me.

Investment choice

Invest my retained Division 5 balance:

☐ % in High Growth

☐ % in Balanced Growth

☐ % in Conservative Growth

☐ % in Cash

100 **% Total**

Your account balance will fluctuate in line with investment earnings earned in your chosen investment option or options until you claim your benefit on retirement (or when you meet another condition of release). See our website for more information about investment options.

If you do not make a choice, your super will be invested in the Balanced Growth option.

6. Proof of identity

Choose how you'll provide proof of your identity:

☐ Electronic ID (this is the easiest way) – Write down the details of your ID below, then go to **Step 7**

☐ By post (certified ID) – Go to **Step 7** and provide certified copies of your documents. Refer to the Identification (ID) requirements flyer at the end of this form.

☐ By email (Selfie ID) – Go to **Step 7** and email us your documents. Refer to the Identification (ID) requirements flyer at the end of this form.

Electronic ID

Important: Please complete all fields below so we can complete an electronic ID check. If your personal details in **Step 1** don't match your ID details, we won't be able to verify your identity. This will delay your request as we may ask for additional certified identification. Please give us a call if you need help with this.

Part 1: Medicare details

Full name (including initials – as shown on your Medicare card)

Medicare number

Valid to (mm/yyyy)

Your reference number on this card

Part 2: Either Australian driver's licence or Australian passport – you don't need to supply both

1 Driver's licence number

Full name (including middle name as shown on licence)

State

Expiry date (dd/mm/yyyy)

Driver's licence card number

6. Proof of identity (continued)

2 Passport number

Full name (including middle name as shown on passport)

Place of birth (as shown on your passport)

Country of birth (as shown on your passport)

Family name at birth (this isn't shown on your passport)

7. Sign the form

By signing this form, I confirm that:

- I understand that there may be a delay in processing if my details change or are incorrect
- I understand that my account balance is subject to the crediting rates applicable on the date this form is processed
- I acknowledge that I must not start employment with another employer in the electricity supply industry within one month of ceasing employment with my current employer
- the services sought relate to superannuation entitlements as a fund member
- I understand that my personal information may be collected, disclosed and used in accordance with ElectricSuper's privacy policy (www.electricsuper.au/privacypolicy)
- I consent to my email address being used to send me information from ElectricSuper, and
- I have received all required information to allow me to make the choices I have made.

Signature

(dd/mm/yyyy)

Lodge your form

If no proof of ID documents required:
electricsuper.db@rs.mpms.mufg.com

or

If proof of ID documents are required:
Post to: ElectricSuper
PO Box 126 Parramatta NSW 2124

Your privacy

Refer to www.electricsuper.au/privacypolicy for information on how your provided information is used and how we treat your privacy.

Queries

1300 307 844
www.electricsuper.au

Issued by the Electricity Industry Superannuation Board ABN 42 457 486 237 as trustee of the Electricity Industry Superannuation Scheme ABN 57 923 283 236

Disclaimer: The information relating to ElectricSuper is subject to change from time to time. The ElectricSuper Rules (the 'Rules') are the final authority when any discrepancy arises between the Rules and any other information about the scheme. The Electricity Industry Superannuation Board recommends that you consult a licensed or appropriately authorised financial consultant before taking action regarding your superannuation.

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electricsuper

Identification (ID) requirements

You'll need to provide proof of identity when you:

- Withdraw your super or fully withdraw your income stream or fully commute a Division 3 Pension
- Rollover to a self managed super fund (SMSF)
- Ask us to search for lost super
- Start a retirement income stream or commence a Lifetime Pension
- Update your banking details

People signing on your behalf will also need to provide proof of identity.

Three ways you can provide proof of your identity

Option 1.
Electronic ID

This is the easiest way to provide proof of your identity.

Write down the details of your ID on the forms you're sending us. You'll need to have these handy:

1. Medicare card **and**
2. Australian driver's licence or Australian passport

We'll use the details you give us to do an electronic ID check. Please complete all fields on this form. For help locating your driver's licence card number, see page 4.

Option 2.
By email (Selfie ID)

Email us your form and electronic copies (scanned or clear photos) of your ID. Your ID doesn't need to be certified. Send us:

1. A photo of you holding your Australian driver's licence **and** a clear photo of the back of the driver's licence



or a photo of you holding your passport



Take your selfie close-up so we can see the writing on your ID

2. **And** any other documents that may be required – see page 2.

Option 3.
By post or in person (Certified ID)

You'll need to post or give us your form with certified copies of documents:

1. A certified copy of your Australian driver's licence (both sides) or Australian passport **and**
2. Any other documents that may be required – see page 2

See page 3 for how to get your ID certified.

Documents you need to give us

What do you want to do?	Electronic ID	Selfie ID/Certified ID
Withdraw $50,000 or less* includes full withdrawals from an ElectricSuper Income Stream or commutation of Division 3 Pension or **Rollover $50,000 or less* to a SMSF**	As described on page 1 – write your ID details on your form	Australian driver's licence (both sides) **or** Australian passport.
Withdraw more than $50,000* includes full withdrawals from an ElectricSuper Income Stream or commutation of Division 3 Pension **or Rollover more than $50,000* to a SMSF**	As described on page 1 – write your ID details on your form	1. Australian driver's licence (both sides) **or** Australian passport **and** 2. Bank statement (dated within six months) where your payment will be made and 3. One of these: • Phone, electricity, gas or water bill (dated within three months) • Council rate or Australian Taxation Office (ATO) notice (dated within 12 months) • Birth certificate/extract, citizenship certificate or pension card.
Open an ElectricSuper Income Stream or Division 3 Pension **or** **Change your ElectricSuper Income Stream or Division 3 Pension banking details**	As described on page 1 – write your ID details on your form	1. Australian driver's licence (both sides) **or** Australian passport **and** 2. Bank statement (dated within six months) where your payment will be made **and** 3. One of these: • Phone, electricity, gas or water bill (dated within three months) • Council rates or ATO notice (dated within 12 months) • Birth certificate/extract, citizenship certificate or pension card.
Search for lost super	As described on page 1 – write your ID details on your form	1. Australian driver's licence (both sides) **or** Australian passport **and** issued concession card **and** 2. One of these: • Phone, electricity, gas or water bill (dated within three months) • Bank statement (dated within six months) • Council rates or ATO notice (dated within 12 months).
Correct your date of birth	As described on page 1 – write your ID details on your form	Australian driver's licence (both sides) **or** Australian passport **or (certified ID only) birth certificate/extract.**
Change your name	Not available	1. Australian driver's licence (both sides) **or** Australian passport . 2. One of these showing a relationship exists between the two (or more) names: • Marriage certificate • Decree absolute (divorce certificate) • Deed poll or Change of name certificate from the Births, Deaths and Marriage Registration Office. *If the name on your account is incorrect (e.g. spelling mistake or employer error), please provide a certified copy of your driver's licence (both sides) or passport and a hard copy Statutory Declaration.*
To sign on behalf of an ElectricSuper member	To set up a Power of Attorney (POA) or Guardianship and make a request: 1. Provide Guardianship papers **or** Post the certified hard copy of the *Power of Attorney* document (every page) **and** 2. Include the relevant form for your request (e.g. withdrawal form) **and** 3. Write your ID details on the *Proving your identity electronically* form. Once the POA/Guardianship is set up, you can use the *Proving your identity electronically* form to sign on behalf of the member. The member's proof of identity will also be required.	To set up a POA or Guardianship and make a request: 1. Provide Guardianship papers **or** Post the certified hard copy of the Power of Attorney document (every page) **and** 2. Include the relevant form for your request (e.g. withdrawal form) **and** 3. Certified ID as indicated in the table above (depending on the type of request). Once your POA/Guardianship is set up, you can use the Proving your identity electronically form to sign on behalf of the member or be required.

* These limits are before tax has been deducted or any interest adjustments.

Hints, tips and troubleshooting

Your ID and account details must match

If you're changing your name, you'll need to provide documentation to prove the change of name (see table on page 2).

Your ID needs to be current and show your name and residential address

Your documents can't be expired, except for an Australian passport which can be used if it expired within the last two years. All certified ID must be dated within 12 months.

Bank statements must show your current name and address

You might be able to download one from your online banking. If your bank account is new and you haven't received a statement yet, you'll need to provide a letter from your bank that shows your name, address, account details and the bank's stamp.

Don't have a driver's licence or passport?

If you don't have a driver's licence or passport, you must provide **four certified documents** from the below list:

1. Bank statement (dated within six months) **and**
2. Birth certificate or birth extract, pension card or Australian citizenship certificate **and**
3. Letter from Centrelink about a benefit, Council rates or ATO notice (dated within 12 months) **and**
4. Phone, electricity, gas or water bill (dated within three months).

If you can't provide the ID we've asked for, give us a call on 1300 307 844 to discuss alternatives.

How to get your ID certified

Take your original documents and a clear photocopy of both sides to an authorised person (see *Who can certify documents*). If documents are written in a foreign language, you'll need to supply an English translation by an accredited translator.

The authorised person needs to:

1. Write or stamp in English on the photocopies words to the effect of 'This is a true and correct copy of the original'.
2. Write their name, qualification (for example, Justice of the Peace, Police Offer, Pharmacist, etc), address and registration number (if applicable).
3. Sign and date the copy.

Example:



Who can certify documents

You can meet with us in person and we'll certify your documents. Find our details at electricsuper.au/meet-with-us/.

The following authorised people can certify your documents.

- police officer
- permanent employee or agent of Australia Post* with five or more years' continuous service, who is employed in an office supplying postal services to the public
- finance company officer with two or more years' continuous service (with one or more finance companies)
- officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), with two or more years' continuous service (with one or more licensees)
- notary public officer†
- registrar or deputy registrar of a court
- Justice of the Peace†
- member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants
- person enrolled as a legal practitioner on a State or Territory Supreme Court, or the High Court of Australia
- Australian consular officer or diplomatic officer†
- Judge, magistrate† or chief executive officer of a Commonwealth court.

The following people can also certify identification – except if you're rolling over your account to a SMSF:

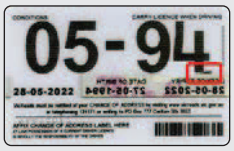
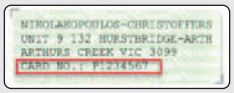
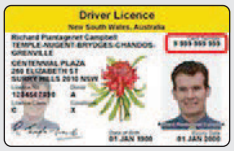
- dentist
- medical practitioner
- optometrist
- pharmacist

* Australia Post may charge to certify ID (contact Australia Post for details).

† These people can certify your ID if you're outside of Australia.

Find your driver's licence card number

Each Australian driver's licence has a unique card number, which is different to your licence number. The location of your driver's licence card number will be different, depending where and when the licence was issued. Check the table below:

Where/when your driver's licence was issued	Location of your card number
Victoria Your licence or learner's permit was issued before November 2022 and you've not reported a data breach.	 Your driver's licence card number is also shown in your VicRoads account – go to vicroads.vic.gov.au to log in.
Victoria Your licence or learner's permit was issued after November 2022, or your licence or learner's permit was re-issued due to a data breach.	 Your driver's licence card number is also shown in your VicRoads account – go to vicroads.vic.gov.au to log in.
Victoria If you've changed your address, this sticker will be on the bottom left at the back of the card and it will show your card number.	
New South Wales	
Northern Territory Your licence was issued before 10 December 2020.	
Northern Territory Your licence was issued from 10 December 2020 onwards.	
Australian Capital Territory (ACT)	
Queensland Your licence was issued before June 2019.	
Queensland Your licence was issued after June 2019.	
South Australia	
Tasmania	
Western Australia	

Please send us your form with your ID

By email: If you're providing Selfie ID. You need to use the email address that's on your ElectricSuper account.

By post or in person: If you're providing certified ID or a hard copy of a POA/Statutory Declaration.

If you need help with proof of identity, call us on the number below, or arrange to meet with us – head to **https://electricsuper.au/meet-with-us/** to find how.

electricsuper.admin@rs.mpms.mufg.com
electricsuper.com.au

1300 307 844
7.30 am to 5.30 pm
(ACST/ACDT)
Monday to Friday

ElectricSuper
PO Box 126
PARRAMATTA NSW 2124

Meet us in person
electricsuper.au/meet-with-us/

Issued by the Electricity Industry Superannuation Board ABN 57 923 283 236 as Trustee of the Electricity Industry Superannuation Scheme. Disclaimer: The information relating to ElectricSuper is subject to change from time to time. The ElectricSuper Rules (the 'Rules') are the final authority when any discrepancy arises between the Rules and any other information about the scheme. The Electricity Industry Superannuation Board recommends that you consult a licensed or appropriately authorised financial consultant before taking action regarding your superannuation.

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