



## IDENTIFICATION AND CERTIFICATION REQUIREMENTS

If you are making a full withdrawal and/or rollover, proof of your identity is required.

You will need to supply certified identification documents. To do this, take the original identification documents and a photocopy of both sides of the original document to an *authorised person* (see list below).

Faxed copies do not comply with our identification requirements, and are not acceptable.

### IDENTIFICATION DOCUMENTS REQUIRED

If you cannot supply a document from list 1 below, you must supply one document from list 2 and one from list 3.

<b>1</b>	<b>One document from list 1</b>
<ul style="list-style-type: none"> <li>a certified copy of a current drivers licence; or</li> <li>a certified copy of a current passport.</li> </ul>	
<b>OR</b>	
<b>2</b>	<b>One document from list 2</b>
<ul style="list-style-type: none"> <li>a certified copy of a birth certificate or birth extract; or</li> <li>a certified copy of a citizenship certificate issued by the Commonwealth of Australia; or</li> <li>a certified copy of a pension card issued by Centrelink that entitles the person to financial benefits.</li> </ul>	
<b>3</b>	<b>AND one document from list 3</b>
<ul style="list-style-type: none"> <li>a certified copy of a letter from Centrelink regarding a Government assistance payment; or</li> <li>a certified copy of a Notice issued by Commonwealth, State or Territory Government or local council within the past twelve months that contains your name and residential address, e.g. Australian Taxation Office Notice of Assessment or Rates Notice from local council.</li> </ul>	

### CERTIFIED LINKING DOCUMENT

Copies of 'certified linking documents' will be required in the case of a name change, or if the applicant is signing on behalf of another person.

**Change of name** – Marriage Certificate, deed poll or Change of Name Certificate from Births, Deaths and Marriages Registration Office.

**Signing on behalf of applicant** – Guardianship papers, or Power of Attorney.

### HOW A DOCUMENT IS CERTIFIED

The authorised person will need to:

- Write or stamp in English on the photocopies, words to the effect of: 'This is a true and correct copy of the original', and
- Write their name, qualification (e.g. Justice of the Peace, Police Officer etc.) and registration number (if applicable), and sign and date.

#### Example:

This is a true and correct copy of the original.

**Name:**

*John R. Smith*

**Qualification:** (an authorised person from list at left)

*Justice of the Peace*

**Registration Number:** (if applicable)

*46879*

**Date:**

*5/12/2009*

**Signature:**

*[Handwritten Signature]*

### AUTHORISED PERSONS

Identification papers must be certified by one of the following authorised persons:

- A police officer
- A finance company officer with five or more years of continuous service (with one or more finance companies)
- An officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL) having five or more years of continuous service with one or more licensees
- A notary public officer
- A registrar or deputy registrar of a court
- A Justice of the Peace
- A permanent employee of Australia Post with five or more years continuous service.
- A person enrolled on the roll of the State or Territory Supreme Court, or the High Court of Australia, as a legal practitioner
- An Australian consular officer or an Australian diplomatic officer
- A judge of a court
- A magistrate, or
- A Chief Executive Officer of a Commonwealth court.

**Note:** Pharmacists are **NOT** eligible to sign this form.

## SUPER INCOME STREAM WITHDRAWAL FORM



This Claim Form acts as an authority for us to release your Cbus benefit. A fully completed application form must be provided when requesting a payment in cash, or the rollover of your account to another complying super fund.

Contact the Cbus Service Centre on 1300 368 212 if you need assistance to complete this form.

STEP 1 MEMBER DETAILS Use BLOCK LETTERS and black or blue pen	
CBUS MEMBERSHIP NUMBER	<input type="text"/>
DATE OF BIRTH	<input type="text"/> DDMMYY
TITLE	<input type="checkbox"/> MR <input type="checkbox"/> MRS <input type="checkbox"/> MS <input type="checkbox"/> MISS <input type="checkbox"/> OTHER <input type="text"/>
FAMILY NAME (SURNAME)	<input type="text"/>
GIVEN NAMES	<input type="text"/>
RESIDENTIAL ADDRESS (UNIT /HOUSE NUMBER & STREET)	<input type="text"/>
SUBURB	<input type="text"/> STATE <input type="text"/> POSTCODE <input type="text"/>
TELEPHONE NUMBERS	HOME ( <input type="text"/> ) <input type="text"/> WORK ( <input type="text"/> ) <input type="text"/> MOBILE <input type="text"/>
<b>GO TO STEP 2</b>	
STEP 2 NOMINATE THE TYPE OF WITHDRAWAL	
I wish to make a:	<input type="checkbox"/> PARTIAL WITHDRAWAL and/or ROLLOVER <b>GO TO STEP 3</b>
<b>OR A</b>	<input type="checkbox"/> FULL WITHDRAWAL <sup>1</sup> and/or ROLLOVER <b>GO TO STEP 4</b>
1. Full withdrawals or rollovers cannot be processed without certified identification. Please refer to the attached instructions.	
STEP 3 PARTIAL WITHDRAWAL AMOUNT	
Nominate the amount you wish to withdraw and specify the investment options from which you wish your withdrawal to be made. Note that, where you request a partial withdrawal of your Super Income Stream, an amended minimum annual income amount will not be recalculated until 1 July of the next financial year.	
<b>Note:</b> The minimum partial withdrawal you can make from any investment option is \$1,000 unless you are withdrawing your entire balance. A minimum balance of \$1,000 must be maintained in each investment option after your withdrawal has been processed.	
<input type="checkbox"/> Please make my withdrawal on a pro-rata basis from my current investment option/s	
<b>OR</b>	
<input type="checkbox"/> I wish to withdraw from the investment option/s as indicated below.	
<b>OPTION</b>	<b>AMOUNT</b>
Capital Guaranteed	\$ <input type="text"/>
Cash	\$ <input type="text"/>
Conservative	\$ <input type="text"/>
Moderate Growth	\$ <input type="text"/>
Core Strategy	\$ <input type="text"/>
High Growth	\$ <input type="text"/>
<b>TOTAL</b>	\$ <input type="text"/>
<b>GO TO STEP 4</b>	