

Release and Transfer Application

TelstraSuper RetireAccess[®]



About this form

Complete this form to transfer from a Transition to Retirement (TTR) income stream to a retirement income stream, if you've retired or will retire prior to the transfer.

Do not complete this form if you're still working and wish to receive income payments from a *TelstraSuper RetireAccess* account under a Transition to Retirement strategy, or if you wish to add super benefits from an accumulation account before commencing a new retirement income stream.

Due to current deeming rules, we recommend that you seek information or financial advice on how a transfer may affect you.

If you have any questions, please contact us on **1300 033 166**.

A

Your details

Title	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Miss	<input type="checkbox"/> Ms	<input type="checkbox"/> Other	<input type="text"/>
Surname	<input type="text"/>			Member number	<input type="text"/>	
Given names	<input type="text"/>			Date of birth	<input type="text"/>	
Residential address <small>(PO Box not acceptable)</small>	<input type="text"/>					
Suburb	<input type="text"/>	State	<input type="text"/>	Postcode	<input type="text"/>	
Home no.	<input type="text"/>	Mobile no.	<input type="text"/>	Business no.	<input type="text"/>	
Email address	<input type="text"/>					

B

Release of preserved benefit declaration

Complete this declaration if any of the funds you have elected to transfer are preserved.

I wish to have my superannuation benefits reclassified as unrestricted non-preserved benefits on the following grounds (please tick ONE option):

I have reached preservation age and permanently retired from the workforce on:
and state that I never intend to become gainfully employed for 10 hours or more per week.

OR

I have reached age 60 and ceased employment on:

OR

I am receiving a Total & Permanent Disablement payment.

OR

I have reached aged 65.

Signature X Date

C**Your income payments**

I would like to continue to receive my current income payments and frequency

OR

I would like to update my income payments and frequency as follows:

When are your income payments to start?

Please indicate the month and year payments are to commence:

Month Year

Choose the frequency of your payments

Twice-monthly Monthly Quarterly Annually

Choose how much money you wish to receive

I elect to receive the standard minimum[‡] income payment according to my elected frequency

OR

I elect to receive a gross amount of \$ # according to my elected frequency

OR

I elect to receive my maximum[^] income payment according to my elected frequency.

[‡] These amounts must be taken on a pro-rata basis if commenced after 1 July.

[#] This amount must be above the minimum income limit relevant to your age and below the maximum limit of 10% of your account balance on commencement. Please refer to the TelstraSuper Retire Access Product Disclosure Statement (PDS) for further details.

[^] Your annual maximum is equal to 10% of your account balance at commencement. You are entitled to your annual maximum regardless of the commencement date of your income stream.

D**Banking details**

Please provide your bank details. Payments can only be made to a bank, credit union or building society, (no credit cards) in your name or in a joint account.

I would like my income paid to my current account

OR

I would like my income paid to the following account.

Name of financial institution

Branch name

Account name

BSB no. Account no.

Note: Please take care when recording your financial institution details, particularly your account number if you would like your benefits to be paid into a credit union account. We recommend that you provide us with a copy of your bank statement so we can verify your account details (do not include your account balance or any transactions details). Neither your bank nor TelstraSuper accept responsibility for any delay or loss of interest caused by providing incorrect details on this form. TelstraSuper is discharged from all liability once your benefits are paid into your nominated account in accordance with your instructions.

E**Your investment choice**

I would like to continue with my current investment choice

OR

I would like to nominate my investment choice as follows:

We recommend you read your **Product Disclosure Statement (PDS)** and obtain whatever assistance you need before making your choice. A buy-sell spread will apply to your investment choice. Refer to the PDS for more information.

Please complete sections 1 and 2.

Section 1

I would like to nominate my investment choice as follows:

Option	Percentage allocation %
Growth	<input type="text"/> %
Balanced	<input type="text"/> %
Diversified Income (restrictions apply*)	<input type="text"/> %
Defensive Growth	<input type="text"/> %
Conservative	<input type="text"/> %
International Shares	<input type="text"/> %
Australian Shares	<input type="text"/> %
Property	<input type="text"/> %
Fixed Interest	<input type="text"/> %
Cash	<input type="text"/> %
Total (must equal 100%)	= 100%

* If you do not currently have funds invested in the Diversified Income option, the percentage allocation must be equivalent to a dollar value of \$100,000 or greater.

Section 2**Where would you like your income drawn from?**

You can choose to have your income drawn from any one of your selected investment options or to have cash flows drawn proportionately from your mix of investment options.

Please note income returns generated from the Diversified Income option are distributed into the Cash investment option. To draw down the income returns, the Cash option will need to be selected.

I would like my income drawn from the

option.

OR

I wish to have my income payments drawn proportionately across my investment options (default).

Note: If you don't make a selection your income payments will be drawn proportionately across your investment options.

F**Your declaration and signature**

By signing this declaration, I:

- confirm that the information in this form is true and correct to the best of my knowledge
- have read and understood the **TelstraSuper RetireAccess PDS** dated 1 February 2017
- understand that the income payments must be paid into an account in my name or in a joint name
- if I still have a current TelstraSuper accumulation account, my insurance cover under that account will continue and I will not receive any insurance under my *TelstraSuper RetireAccess* income stream.

Signature X

Date

Please return completed form to:
Telstra Super Pty Ltd, PO Box 14309, MELBOURNE VIC 8001

Telstra Super Pty Ltd complies with the Privacy Act 1988 (Cth).

For further information on privacy, please contact the Privacy Officer on 1300 033 166 or visit our website at telstrasuper.com.au to download a copy of our Privacy Policy or Privacy Collection Statement.

© is a registered trademark in Australia of the Telstra Corporation Limited.

© Telstra Super Pty Ltd

Telephone 1300 033 166 Facsimile 03 9653 6060 telstrasuper.com.au

Telstra Super Pty Ltd, ABN 86 007 422 522, AFSL 236709 is the Trustee of the Telstra Superannuation Scheme (TelstraSuper) ABN 85 502 108 833.