



# Retirement Benefits Fund Board

GPO Box 446, Hobart Tas 7001

Telephone: 1800 622 631 or 03 6233 3672

Facsimile: 03 6233 3357

## ALLOCATED PENSIONS – CAPITAL WITHDRAWAL

Use this form to withdraw a lump sum from your RBF Allocated Pension account.

If this form is not completed in full, a further written election may be required. We cannot process a withdrawal based on verbal instructions. This may delay your payment request.

RBF staff are available by phoning 1800 622 631 to answer questions or provide assistance to complete this form.

### Member's Details:

Full Name: .....

Postal Address: .....

Suburb ..... State ..... Postcode .....

Residential Address:  As above .....

Suburb ..... State ..... Postcode .....

Email Address: .....

Phone Numbers: ..... (Home) ..... (Business) ..... (Mobile)

Member Number: ..... Date of Birth: ...../...../.....

### If you are an overseas resident

Country of residence: .....

Country of citizenship: .....

### If you opened your account as the partner of an RBF member

Occupation: .....

Employer: .....

### If you are self employed

Includes any person who has made tax deductible contributions to their RBF account.

Occupation: .....

Business Name (if any): .....

Business Address: .....

Suburb ..... State ..... Postcode.....

ABN (if any) .....

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**Verifying your identity**

Under Commonwealth legislation, RBF is now required to verify your identity before making a payment. If you have already provided a certified copy of documents to verify your full name, date of birth and current residential address you do not need to do so again.

Any one of the following is acceptable to verify your identity:

- Current driver's licence or other government issued card that includes your full name, date of birth, current residential address and photograph.
- Current passport that includes your full name, date of birth and photograph.
- Original birth certificate or birth extract showing your full name at your date of birth. If you have changed your name, you will need to provide certified copies of documents relating to your name change (eg marriage certificate). You will also need to provide evidence of your current residential address (eg a notice issued by a utilities provider or local government within the last 3 months).

**Provide certified copies or show the original to an RBF staff member**

Your documents can be certified by Australia Post, a Justice of the Peace or by most accountants, financial planners, lawyers and police officers. RBF must receive the original certified copy. Copies or facsimiles of the certified document are not acceptable. The person certifying the document will need to write on the copy that they have seen your original document. They must also sign and date the copy, write their name and the basis on which they are authorised to certify such documents.

If the certification is not completed correctly, RBF cannot verify your identity in accordance with the legislative requirements.

More information is available about correct certification and acceptable documents to verify your identity on the Forms & Publications area of RBF's website [www.rbf.com.au](http://www.rbf.com.au).

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**Capital Withdrawal Instructions:**

Amount of Withdrawal:            \$..... GROSS / NET (*please indicate*)

Please withdraw from MIC option(s):

Your withdrawal will be deducted according to your existing draw down order unless you elect otherwise.

Member Investment Choice option	Portion of MIC option to be used	
	Percent	Amount
	%	\$
	%	\$
	%	\$

Note: Where an entire account balance is withdrawn, investment returns are not applied during the processing period. In peak processing times this may be between 6 to 13 days.

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**Annual Pension Value**

If you do not make an election, your annual pension value will only be adjusted where the current annual pension value is less than the minimum calculated after the capital withdrawal. If this is the case your annual pension value will be changed to the new minimum.

New annual pension value after withdrawal:  Minimum amount

\$..... per annum

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*You will need to sign the declaration on the next page to complete your withdrawal application.*

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**Payment Instructions:**

- Please send me a cheque.
- Please deposit my payment into the following Bank, Credit Union or Building Society account shown below:

Name of Institution: .....

Branch Address: .....

Account Name: .....

Credit Union Member Number: .....

BSB Number: ..... Account Number: .....

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**Declaration** (tick box where declaration is true)

I understand that this capital withdrawal may cause recalculation of my minimum pension and I will be advised by RBF of my new pension amount.

I understand that tax will be deducted from my withdrawal if I am under age 60 and my account includes taxable funds.

I understand that if I do not provide RBF with my Tax File Number, tax will be deducted from my withdrawal amount at the top marginal tax rate irrespective of my age.

Tax File Number .....

*If you have already provided your Tax File Number, there is no need to do so again.*

- I have previously provided certified copies of documents to verify my full name, date of birth and/or current residential address.
- I have attached a **certified copy** of evidence to verify my full name, and either date of birth and/or current residential address. *(Please note RBF is required to verify your identity before making a payment.)*

**Signature:** ..... **Date:** .....