



Retirement Benefits Fund Board

GPO Box 446, Hobart Tas 7001

Telephone: 1800 622 631 or 03 6233 3672

Facsimile: 03 6233 3357

RBF INVESTMENT ACCOUNT – WITHDRAWAL APPLICATION

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:/...../.....

Withdrawal Instructions:

Note: where an entire account balance is rolled over or withdrawn, investment returns are not applied during the processing period.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

Please withdraw the following from my RBF Investment Account.

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

Member Investment Choice Option:

Your withdrawal will be deducted from the default Member Investment Choice option – RBF Actively Managed, unless you clearly elect otherwise. Alternatively, your withdrawal will be progressively drawn from member investment options in order of risk.

Payment Instructions:

Payment by: personal cheque direct deposit to account detailed below

Name of Institution:

Branch Address:

Account Name:

Credit Union Member Number:

BSB Number: Account Number:

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.

If you are an overseas resident, self employed or opened your account as the partner of an RBF member, please also complete the Additional Identity Verification section at the end of this form.

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).
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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.

Declaration (tick box where declaration is true)

- This withdrawal is from my Unrestricted Non-preserved funds.
- I am 55–59 years, retired and have no intention of seeking full time or part time employment.
- I am age 60 or over and am not working more than 10 hours per week.
- I am totally & permanently incapacitated. (*Suitable evidence will be required.*)
- I am age 65 or over.

Tax File Number (optional)

Any tax payable will be deducted from your payment at the top marginal rate if RBF does not have your TFN.

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

Signature: **Date:**

Additional Identity Verification

This section must be completed if you are:

- An overseas resident
- Opened your account as the partner of an RBF member
- Self employed

Overseas Resident

Country of residence:

Country of citizenship:

Opened your account as the partner of an RBF member

Occupation:

Employer:

If you are self employed, please provide details below.

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)