

Election to Commute SSS Pension to Lump Sum

Please print clearly in black ink.

1. Personal details

Member number

Mr/Mrs/Ms/Miss/Dr

Male

Female

Birth date (DD-MM-YYYY)

 - -

Given name(s)

Family name

Residential address

Suburb

State/Territory

Postcode

Postal address (if different from residential address)

Suburb

State/Territory

Postcode

Work or Home

Daytime contact telephone number

Mobile number

Email address

If you need help with this form

Contact Customer Service between 8:30 am and 5:30 pm AEST from Mon–Fri on **1300 130 096** or email **enquiries@stc.nsw.gov.au**

2. Spouse/de facto partner details (where applicable)

Please cross the box that applies.

Do you have a spouse or de facto partner?

☐

Yes. If yes, please provide their details below.

☐

No

Mr/Mrs/Ms/Miss/Dr

Male

Female

☐☐☐☐☐☐

Given name/s

☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

Family name

☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐

Birth date (DD-MM-YYYY)

☐☐☐☐☐☐☐☐

Date of marriage

☐☐☐☐☐☐☐☐

If you are not married but are living together in a de facto relationship:

Date of commencement

☐☐☐☐☐☐☐☐

The 'spouse' of a person also includes:

- another person (whether of the same or a different gender) who, although not legally married to the person, lives with the person on a genuine domestic basis in a relationship as a couple
- another person (whether of the same or a different gender) with whom the person is in a relationship that has been registered under a state or territory law dealing with the registration of certain prescribed relationships.

3. I understand the legislation

It is important you read and understand SSS Fact Sheet 14: *Exchanging your pension for a lump sum* which is provided with this form.

☐

I have read and understood SSS Fact Sheet 14 which explains the legislation affecting my election.

Please cross the box to certify:

4. Election to commute (exchange)

Please cross one box only:

a

☐

I wish to give up the whole of my pension and take a lump sum instead. I will also take as a lump sum any pension arising from salary increases paid in the future.

b

☐

I wish to give up some of my pension as a lump sum and keep the balance as a pension.

i)

☐

I wish to keep a **gross** fortnightly pension of

\$

☐☐☐☐☐☐

and take the balance as a lump sum. I will also take as a lump sum any pension arising from salary increases paid in the future. **OR**

ii)

☐

I wish to take a **gross** lump sum of

\$

☐☐☐☐☐☐☐☐

and keep the balance as a pension.

Please indicate either i) or ii)

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4. Election to commute (exchange) *continued*

c ☐ I wish to give up some/all of my fortnightly pension in **two stages***:

First payment to be a **gross** lump sum of:

\$

Second payment to be a **gross** lump sum of:

\$

(*The legislation allows you to choose to commute (exchange) your pension in two stages if you prefer, with each lump sum being payable on a different date, **provided that** both dates occur within 13 months of the date when your right to commute first arose. Please also complete Section 5.)

Please note the following:

- the gross lump sum amount nominated may be subject to tax. If tax is applicable the lump sum amount you are paid will be less than the amount you nominate. Please seek financial advice for assistance on whether tax will be payable.
- the lump sum amount you are paid may be greater than the amount you nominate if additional interest is payable due to the date of payment being after the date the commutation took effect
- the lump sum amount you are paid may be less than the amount you nominated if fortnightly pension payments were made after the date that the commutation took effect. Any overpaid pension is deducted from the lump sum before it is paid to you.

5. When do you want your lump sum election to take effect?

Please note that payment will be made as soon as practicable after the effective date. Interest will be paid for the time between the effective date and the actual payment date.

Please indicate one of a, b or c in part 1 only. Please also complete part 2 if you wish to commute your pension in two stages.

1 a) ☐ If your election is being made in the six months before your 55th or 60th birthday as appropriate.

I wish for my election to take effect on:

☐ My 55th birthday, *or*

☐ My 60th birthday.

OR

b) ☐ The day this form is received by Mercer.

OR

c) From the following date:

(DD-MM-YYYY)

- -

(within 13 months of the date your right to commute arose).

2 Please complete only if you have crossed box c in section 4 of this form.

I wish the second payment to be effective from the following date:

(DD-MM-YYYY)

- -

Only applicable if this date is after your 55th or 60th birthday as appropriate. Please see SSS Fact Sheet 14 *Exchanging your pension for a lump sum* for more information.

Within 13 months of the date your right to commute arose.

Not before the first payment and within 13 months of the date your right to commute arose.

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6. How do you want to be paid? *continued*

☐ Directly to you

Please note that you will need to provide a copy of an extract of your bank statement with your application that clearly shows the account name and number.

Name of account holder (the account must be held solely or jointly in your name)

BSB number

Account number

Name of bank/building society/credit union

Branch

Direct crediting is not available on a full range of accounts, or for all building society and credit union accounts. To confirm whether this facility is available, please check with your financial institution.

7. Please sign here

I certify that the information given in this Form is correct.

I have reviewed Section 8 - Proof of Identity and Section 9 - Electronic verification, and confirm the following (please select one or more):

☐

I am not required to provide proof of identification as I am not receiving any part of my benefit in cash and am not rolling over any part of my benefit to a self-managed superannuation fund (SMSF)

☐

I have provided certified proof of identity documents

☐

If my proof of identity documents are not certified correctly, I consent to State Super or Mercer Administration Services (the fund administrator) verifying my identification electronically.

☐

I have provided electronic verification information in Section 9. I consent to State Super or Mercer Administration Services (the fund administrator) verifying my identification electronically.

Note - if you provide authorisation to have your identity verified electronically but the documents are not compatible, you will need to provide certified copies of the required documents. We will contact you if this is the case.

Name (Print in BLOCK LETTERS)

Signature

Date (DD-MM-YYYY)

If you need help with this form

Contact Customer Service between 8:30 am and 5:30 pm AEST from Mon–Fri on **1300 130 096** or email **enquiries@stc.nsw.gov.au**

What to do next

Call Customer Service you if you have any enquiries.

Return the completed form to

State Super (SSS)
GPO Box 2181
MELBOURNE VIC 3001

Your privacy

The information you provide in this form is collected on behalf of and held for State Super by the scheme administrator, Mercer Administration Services (Australia) Pty Ltd, in accordance with STC's Privacy Statement, the *Privacy and Personal Information Protection Act 1998 (NSW)* and the *Health Records and Information Privacy Act 2002 (NSW)*, under which you have rights of access and correction. Information you provide may be disclosed to lawfully authorised government agencies and third parties.

For further information about privacy, contact Mercer by writing to:

GPO Box 2181
Melbourne VIC 3001

or visit

www.statesuper.nsw.gov.au

ABN 29 239 066 746
SPIN SAS0101AU

8. Proof of Identity

You may need to provide certified[†] proof of identity documentation or electronic verification information with your application to prove that you are the person to whom the superannuation entitlements belong.

Proof of identity is only required if your application is for:

- the payment of a pension benefit
- the payment of any part of your benefit as a lump sum payable directly to you – including your basic benefit
- the rollover of any part of your benefit to a Self Managed Super Fund (SMSF).

Note – You are **not required** to provide proof of identification if you are applying for a fully commuted pension or a lump sum benefit – and you are applying to rollover your **entire** benefit (including your basic benefit) to a complying superannuation fund, **other than a self managed superannuation fund (SMSF)**. If your entire benefit is being transferred to a complying superannuation fund (other than a SMSF), we are able to verify your identity through the Australian Taxation Office (ATO) using their Super TFN Integrity Check (Super TICK) service. In the event that Super TICK is unavailable or if the records we hold do not match the ATO records – identity documents may be required. **Identity documents or electronic verification information will still be required for rollovers to a SMSF.**

The following certified documents can be accepted:

Either

One of the following certified documents:

- Current Australian State or Territory drivers licence containing a photograph of the person, or

- Australian Passport, or
- Current card issued under a State or Territory law for the purpose of providing a person's age containing a photograph of the person, or
- Current foreign passport or similar travel document containing a photograph and the signature of the person*

OR

One certified document from each of the following groups:

Group 1

- An Australian birth certificate or birth extract issued by a State or Territory
- Citizenship certificate issued by the Commonwealth
- Current pension card issued by Centrelink that entitles the person to financial benefits.

Group 2

- Notice issued by the Commonwealth or a State or Territory government within the preceding 12 months that records the provision of financial benefits to you, i.e., a letter from Centrelink.
- Notice issued by the Australian Taxation Office within the past twelve months that contains your name and residential address and records an amount payable to or by you, i.e., your last tax assessment.
- Notice issued by a local government body or utilities provider within the past three months showing the provision of services to you and your current residential address, i.e., water, gas or electricity bill, rates notice.

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8. Proof of Identity *continued*

* Documents not written in English must be accompanied by an English translation prepared by an accredited translator.

Change of name

Make sure that proof of change of name is also provided if your current name is not the same as the name on these documents, e.g. Change of name certificate, or deed poll document.

If your name has changed on marriage, a marriage certificate issued by the Registry of Births, Deaths and Marriages is required; ceremonial marriage certificates are not acceptable.

† Certified means that all copied pages of original proof of identity documents or change of name documents have been certified as true copies by an individual approved to do so. Persons who are authorised to certify documents

must sight the original and the copies and make sure both documents are identical, then make sure that all copies are certified as true copies by writing or stamping 'certified true copy' followed by the individual's signature, printed name, qualification and date.

If you are in Australia

The following persons are eligible to certify copies of original documents:

- Australia Post Permanent Employee or Agent (who is currently employed with the post office and has at least two continuous years of service or is in charge of supplying postal services to the public)
- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
- Bailiff
- Bank Officer, Building Society Officer or Credit Union Officer (with two or more years of continuous service)
- Chiropractor
- Commissioner for Affidavits or Declarations
- Court Officer: Registrar or Deputy Registrar of a Court, Judge, Clerk, Magistrate, Master of a Court, Chief

Executive Officer of a Commonwealth Court

- Dentist
- Fellow of the National Tax Accountants' Association
- Finance Company Officer (with two or more years of continuous service with one or more finance companies)
- Justice of the Peace
- Legal practitioner
- Marriage celebrant (registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961)
- Medical practitioner
- Member of Chartered Secretaries Australia
- Member of Commonwealth Parliament, State Parliament, Territory Legislature or a Local Government Authority (State or Territory)
- Member of Engineers Australia (other than at the grade of student)
- Member of the Association of Taxation and Management Accountants
- Member of the Australasian Institute of Mining and Metallurgy
- Member of the Australian Defence Force (who is an officer; or a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with two or more years of continuous service or a warrant officer within the meaning of that Act)
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants
- Minister of Religion (registered under Subdivision A of Division 1 of Part IV of the Marriage Act 1961)
- Notary Public
- Nurse
- Optometrist
- Officer with, or a credit representative of, a holder of an Australian credit licence, having two or more years of continuous service with one or more licensees

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8. Proof of Identity *continued*

- Officer with, or authorised representative of, a holder of an Australian financial services licence, having two or more years of continuous service with one or more licensees
- Patent attorney
- Permanent employee of the Commonwealth (or Commonwealth Authority) or a State or Territory (or State or Territory Authority) or a Local Government Authority with two or more years of continuous service
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- Pharmacist
- Physiotherapist
- Police Officer, Sheriff's Officer or Sheriff
- Psychologist
- Senior Executive Service Employee of the Commonwealth (or Commonwealth Authority) or a State or Territory (or State or Territory Authority)
- Teacher employed on a full-time basis at a school or tertiary education institution
- Trade marks attorney
- Veterinary surgeon

If you are outside Australia

The following people are eligible to certify copies of original documents outside of Australia:

- consular staff at an Australian Embassy, High Commission or Consulate
- a public notary or other person authorised to administer an oath or affirmation or to authenticate documents in the country you are visiting or living in.

The professions listed under **If you are in Australia** can only certify documents outside Australia if they work or are registered in Australia. Where your documents are certified outside Australia, the certifier must quote their registration number or the relevant law that qualifies them to authenticate your documents.

If you need help with this form

Contact Customer Service between 8:30 am and 5:30 pm AEST from Mon–Fri on **1300 130 096** or email **enquiries@stc.nsw.gov.au**

Please complete this section if you would prefer to allow us to verify your identity information electronically, instead of providing certified proof of identity documents.

You must provide complete details for any TWO of the following (note, only Australian documents can be verified electronically)

[illegible]

Green Blue Yellow

[illegible][illegible]

113 114 115

_____ - _____ - _____

[illegible]

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If you provide authorisation to have your identity verified electronically but the documents are not compatible, you will need to provide certified copies of the required documents and post these to us. We will contact you if this is the case.

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