

Family Law Payment Split request form

This form is to be used by a non member spouse to request Equity Trustees Superannuation Limited, the trustee of the Zurich Master Superannuation Fund ("Trustee"), to either: transfer your entitlements to another Zurich superannuation investment, to transfer your entitlement to another complying Superannuation Fund, or to pay your entitlement as a lump sum payment.



1 Non member spouse personal details (your details)

Title	Surname		
Given name(s)	Date of birth	/	/
Residential address	State	Postcode	
Postal address (if different to above)	State	Postcode	
Contact details	Work ()	Home ()	
	Mobile	Email	

2 Members personal details (spouse's details)

Title	Surname		
Given name(s)	Date of birth	/	/
Zurich Investment number			

3 Request to the Trustee

I request that the Trustee:

- Transfer my entitlement to another complying Superannuation Fund (complete sections 4, 9 and 10)
- Transfer my entitlement to another Zurich Superannuation Investment (complete sections 5, 9 and 10)
- Pay my entitlement to me as a lump sum payment (complete sections 6, 7, 8, 9 and 10)

Note: you may only request a lump sum payment if you meet a superannuation 'condition of release' eg retirement.

4 Benefit transfer (to be completed for all transfers to another complying superannuation fund)

Please note: In accordance with superannuation legislation, only transfers to a registered complying superannuation fund are allowed.

I request that my interest be transferred to:

Nominated Super Fund name (ie transfer fund name)

Nominated Superannuation Fund Unique Superannuation Identifier (USI)*

Cheque to be made payable to

Postal Address of Nominated Super Fund

State

Postcode

Nominated Super Fund SFN / ABN

Investment number / Nominated Superannuation Fund SPIN Number

*** IMPORTANT: Please contact the nominated superannuation fund for their USI. Zurich will not be able to process your redemption request without it.**

Payment to a Self-Managed Superannuation Fund (SMSF)

- Cheque made payable to the SMSF
- Direct credit payment to an Australian bank account in the name of the SMSF.

Important: Where a direct credit to the SMSF account has been requested, please provide a copy of a bank account statement header OR bank account establishment confirmation document showing details of the account including the account name. In accordance with APRA/ATO guidelines, if you do not provide one of these documents, a cheque issued in the name of the Fund will be provided instead.

5 Transfer to another Zurich Investment

Transfer to an existing Zurich Superannuation investment: Investment number

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New Zurich Superannuation Investment

Note: If you require a new investment to be opened please call Zurich Customer Care on 131 551 or contact your Adviser, to obtain the relevant offer document, including a current application form. Once you have completed the application form return this with your completed Payment Split Request Form.

6 Lump sum payment

Are you a citizen or a permanent resident of Australia or New Zealand? Yes No

If 'No', and you are or were a temporary resident you are only able to redeem (withdraw) your preserved superannuation benefits under limited circumstances. Please contact Zurich on 131 551 before completing this form.

Please pay a cash payment to me, as I meet one of the following criteria (please tick the one criteria you best satisfy):

- I have reached my preservation age* and have ceased gainful employment and have no intention by become gainfully employed either on a part or full time basis.
- I am age 60 or more and ceased gainful employment on or after my 60th birthday.
- I am 65 or more.
- I meet a condition of release not specified above (please specify below).

* Use the following table to work out your preservation age.

Date of birth	Preservation age
Up to 30-6-1960	55
1-7-1960 to 30-6-1961	56
1-7-1961 to 30-6-1962	57
1-7-1962 to 30-6-1963	58
1-7-1963 to 30-6-1964	59
1-7-1964 +	60

7 Tax File Number (TFN)

Your TFN is confidential and under superannuation law the Trustee is allowed to collect it to administer your request. Your TFN may be disclosed to the Trustee of another complying superannuation fund if your benefits are transferred, unless you request in writing for your TFN not to be disclosed.

I advise that my TFN is:

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and I authorise for this number to be quoted for the circumstances listed above.

Note: It is not compulsory for you to quote your tax file number, however, if you don't you may pay more tax on your benefit than you have to. In this instance you would have to reclaim the additional tax through the income tax assessment process.

8 Payment details

Preferred method of payment (to be completed for lump sum payments only)

- Cheque made payable to you
- Direct credit payment to an Australian bank account in your name or a joint account where you are an account holder

Direct credit details

Please provide the bank account details where you would like the funds to be deposited:

Name of financial institution

Address

State

Postcode

Bank/State/Branch (BSB number)

Account number

Account name

Please check with your bank or financial institution that account details are correct. Incorrect information can result in payment to the wrong account. Zurich is not responsible for funds paid to the wrong account on your instruction.

9 Claimant declaration and discharge

I declare that all information and documents I have provided are true and correct.

I agree that the Trustee's payment or transfer of my entitlement constitutes a full and effective discharge from the Equity Trustees Superannuation Limited (the Trustee) of its obligations.

Claimant's signature

Date

X

/ /

Your privacy

Zurich and the Trustee are bound by the Privacy Act 1988 (Cth). In completing the forms or questions herein you will be providing Zurich and the Trustee with your personal and, perhaps, sensitive information. The collection and management of this information is governed by the Privacy Act 1988. Please refer to the 'Trustee Privacy Statement' section in the "**Zurich Superannuation Plan and Zurich Account-Based Pension Fee Guide and Additional Information**" document located at www.zurich.com.au/zspandzabp.

A more detailed explanation of the Trustee's Privacy policy is available at www.eqt.com.au/global/privacystatement and can be obtained by contacting the EQT Group's Privacy Officer on (03) 8623 5000, or alternatively by contacting us via email at privacy@eqt.com.au. You should refer to the EQT Group Privacy policy for more detail about the personal information the EQT Group collects and how the EQT Group collects, uses and discloses your personal information.

For information about Zurich's Privacy Policy, a list of service providers and business partners that Zurich may disclose your Information to, a list of countries in which recipients of your Information are likely to be located, details of how you can access or correct the Information we hold about you or make a complaint, please refer to the Privacy link on the Zurich homepage – www.zurich.com.au, contact Zurich by telephone on 132 687 or email at privacy.officer@zurich.com.au

If you are unsure how to complete your identification form please contact Zurich Customer Care on 131 551 for assistance.

14 What identification items do we need from you?

To enable the Trustee to finalise payment of your redemption / transfer, we require proof of identification to be provided together with your completed Redemption / Transfer form. Please note that the processing of your redemption / transfer will be delayed where you do not provide adequate identification.

If your Redemption / Transfer request is for a rollover to another complying superannuation fund (excluding a Self-Managed Superannuation Fund) you will not have to provide certified proof of identity documents. Instead you can provide your TFN which we will validate using the ATO's Super TIC service. Where we are unable to validate your TFN, you will be required to provide proof of identity documents to the Trustee before we can finalise your redemption / transfer.

If you have not previously provided the Trustee with your TFN you can provide Zurich with your TFN by:

- Providing it in Section 7 of this form
- Phone: Call Zurich Customer Care on 131 551
- Mail/Email: Complete a TFN Notification form (available online at www.zurich.com.au) and return it to The Trustee, Zurich Master Superannuation Fund, C/- Zurich Customer Care, at Locked Bag 994, North Sydney NSW 2059 or email it to client.service@zurich.com.au

In circumstances where we are unable to validate your TFN using the ATO's Super TIC service, or where you wish to rollover to a Self-Managed Superannuation Fund or for a redemption of your member benefit to be paid, you will need to provide us with a certified copy of ONE of the following photographic documents:

Please tick which one applies

- An **Australian passport** (provide the pages that identify you, including the page with your photograph). A passport that has expired up to 2 years ago is also acceptable;
- An **Australian State or Territory driver's licence bearing your photograph** (front and back copies are required);
- A **proof of age card** issued by an Australian State or Territory (must contain a photograph of you);
- A **Foreign passport containing your photograph and signature** (see below for information on providing foreign language documents).

OR

If you cannot provide a certified copy of one of the above documents then you must provide **certified copies** of one document from column A and one document from column B.

A	B
<input type="radio"/> Australian birth certificate OR <input type="radio"/> Australian death certificate (for death claims only)	<input type="radio"/> Letter from Centrelink (or other Commonwealth, State or Territory agency) issued to you within the last 12 months regarding a government assistance payment showing your name and residential address
<input type="radio"/> Australian citizenship certificate	<input type="radio"/> Utilities bill or local government notice issued to you within the last three months showing your name and residential address
<input type="radio"/> Health card issued by Centrelink	<input type="radio"/> Notice issued by the ATO to you within the last 12 months showing your name and residential address
<input type="radio"/> Pension card issued by Centrelink (front and back copies)	<input type="radio"/> Notice from school principal showing name, residential address and period of attendance of person under 18 issued within previous three months

If you cannot provide any of these documents or you are unsure how to complete your identification form please contact Zurich Customer Care on 131 551 for assistance.

For a complete list of persons who can certify copies of documents, please contact Zurich Customer Care on 131 551, or refer to the Zurich website, www.zurich.com.au.

How to certify a copy of a document

The law requires that we receive certified copies of the identification documents you provide us. A certified copy is a document that has been certified as a true copy of an original document by certain persons.

An example of a certified document:

I, John Smith of 123 Park Street, Sydney NSW 2000 in the capacity of a Justice of the Peace certify that this copy is a true and accurate copy of the original.

Signature: _____ *J. Smith*

Date: _____ *1/7/2019*

Please note:

- **Any identification documents that are in a foreign language must be accompanied by an English translation from an accredited translator.**
- **If identification documents are being certified outside of the Commonwealth of Australia, generally speaking they may only be certified by an Australian consular officer (within the meaning of the Consular Fees Act 1955) or an Australian diplomatic officer. For further information on obtaining certification whilst overseas, please contact Zurich Customer Care on 131 551 (when calling from Australia) or 61 2 9995 1111 (when calling from overseas).**