

# LUMP SUM WITHDRAWAL FORM

BELL POTTER PERSONAL SUPERANNUATION SOLUTIONS

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## BELL POTTER

### PLEASE COMPLETE IF YOU WOULD LIKE TO:

1. Make a cash withdrawal from your superannuation fund; or  
(Note: government restrictions may apply)
2. Roll over your superannuation to another fund

There are two instances where a member can withdraw money from their fund.

#### 1. Withdrawal

Provided you are permitted by law, you can withdraw cash from your superannuation fund. Generally you will be permitted to make withdrawals if:

- You are 65 years of age; or
- You are over 55 and have retired; or
- You have ceased working due to permanent ill health; or
- You have unrestricted non-preserved benefits in your superannuation, which you are able to draw on.

#### 2. Roll over

If you wish to roll over part or all of your benefit (e.g. To switch your benefits from one superannuation fund to another). Please complete all relevant sections of the **Withdrawal Form**.

If the partial roll over is to take place, please indicate which superannuation components are required to be rolled over.

**For further details please call 1300 730 138**

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## BELL POTTER

Fund Name

Account Number

### 1. Member details

Full Name

### 2. Cash Payment or Roll Over Request – please complete the following:

Cash Payment  Roll Over

Payment amount \$   Gross Payment  Net Payment

### ETP Components

**Note:** If no components are selected then funds will be withdrawn from the Pre/Post 83 component first.

Undeducted	\$	Invalidity	\$
Concessional	\$	CGT Exempt	\$
Pre/Post 83	\$		

### Payment details – Bank/Building Society/Credit Union account

Account Name

Account Number

Financial Institution

Branch

BSB Number

### Payment details – Cheque

Member Name/Roll Over Fund

Member/Roll Over Fund Address

Postcode

### Member's Signature

Signature

Date (dd/mm/yyyy)

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