



# Withdrawal/Rollover Form

MLC Nominees Pty Limited  
 ABN 93 002 814 959  
 AFSL 230702 RSE L0002998

MLC Limited  
 ABN 90 000 000 402  
 AFSL 230694

The Universal Super Scheme  
 ABN 44 928 361 101  
 R1056778

**Please note: do not use photocopies of this form as it contains unique routing and tracking information that assists MLC in the timely processing of your application.**

## YOUR ACCOUNT DETAILS

**1** Account number

**2** Surname (Family name) *(PLEASE PRINT)*

Given name(s) *(PLEASE PRINT)*

**3** Date of birth

 /  / 

**4** Residential address (PO Box is **not** acceptable)

  


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 Postcode

Home number

 ( )

Work number

 ( )

Mobile number

Email address

**5** Have you previously provided us with your current Tax File Number (TFN)?

No  **Enter your Tax File Number below.**

Tax File Number

You are not obliged to provide a TFN, however where a valid TFN has not been provided we are required to deduct tax at the highest marginal rate (plus the Medicare Levy) from any withdrawals.

Yes  **Go to question 6**

**6** Is this a Non-Commutable Allocated Pension or MLC MasterKey Term Allocated Pension?

No  **Go to question 8**

Yes  **Go to question 7**

**7** Please indicate the reason for your withdrawal or rollover.

I have reached my preservation age and have permanently retired<sup>1</sup>

I am aged 60 to 64 and have left the service of an employer since reaching age 60. I have attached a letter (or other proof) from my previous employer confirming the date I ceased employment.<sup>1</sup>

I am over age 65<sup>1</sup>

I have been granted release by the Trustee on the grounds of permanent incapacity, financial hardship or compassionate grounds<sup>1</sup> (Conditions apply)

To pay a superannuation surcharge liability<sup>1,2</sup>

To give effect to a payment split under Family Law provisions<sup>1,2</sup>

Rollover to another Non-Commutable Income Stream<sup>1</sup>

Used to purchase another Complying Income Stream<sup>2</sup>

To rollover to a superannuation or Retirement Savings Account<sup>1</sup>

<sup>1</sup> Withdrawal restrictions for Non-Commutable Allocated Pension.

<sup>2</sup> Withdrawal restrictions for MLC MasterKey Term Allocated Pension.

For further information please refer to the current Product Disclosure Statement.

**If you have not met any of the above conditions of release, you will not be able to make a lump sum withdrawal.**

**8** Please specify the type of payment you are requesting

Rollover<sup>3,4</sup>  **Go to question 9**

Withdrawal / Additional payment<sup>3</sup>  **Go to question 11**

<sup>3</sup> Conditions apply for investors in a Fixed Rate Fund.

<sup>4</sup> Conditions apply for investors in a Non-Commutable Allocated Pension and MLC MasterKey Term Allocated Pension.

## YOUR ROLLOVER DETAILS

**9** Do you wish to rollover all/part of your benefit?

Full Rollover  **Go to question 10**

Part Rollover  Specify amount

\$  **Go to question 10**

A part rollover will be taken out of the **taxable** and **tax-free** components in proportion to those components at the time of the rollover.

Please specify if you wish the part rollover to be made from a specific investment option(s). If no investment options are specified, the part rollover will be made pro-rata across your investment option(s)

Investment Option	Percentage %	Amount (\$)

**10** Please provide details of the investment provider receiving the rollover or transfer. Your claim may be delayed if you do not provide the receiving fund's ABN.

Cheque payee name

Investment provider name and address

  
  
 Postcode    

Australian Business Number (mandatory)

          

Superannuation Fund Number (if applicable)

          

Superannuation Product Identification Number (if applicable)

          

Customer reference/account number (if known)

**Go to the Declaration**

## YOUR WITHDRAWAL / INCOME PAYMENT DETAILS

**11** Please specify the type of withdrawal you wish to receive

1. Additional income payment

Specify amount

\$

**Go to the Declaration**

You must not exceed your maximum income level. Your payment will be made according to your current drawdown strategy.

2. Full lump sum withdrawal

**Go to question 12**

3. Part lump sum withdrawal

Specify amount

\$

**Go to the Declaration**

A part withdrawal will be taken out of the **taxable** and **tax-free** components in proportion to those components at the time of the withdrawal.

Please specify if you wish the part lump sum withdrawal to be made from a specific investment option(s). If no investment options are specified, the part lump sum withdrawal will be made pro rata across your investment option(s)

Investment Option	Percentage %	Amount (\$)

**12** Please provide your account details to enable us to transfer your lump sum withdrawal. **If no instructions are provided your payment will be made to your pre-nominated bank account.**

**Note:** If you wish to have your withdrawal paid to a third party bank account where you are not the account holder, we require proof of identity documents for each recipient. If the third party recipient account is in joint names, proof of identity is required for each account holder.

Please refer to **mlc.com.au** for the 'Proof of Identity Form'.

Financial institution name

Financial institution address

  
  
 Postcode    

Account name

BSB number

   -   

Account number

         

## DECLARATION

I declare that:

- All details in this form are true and correct.
- I authorise the withdrawal from my account as specified in this form.
- I authorise the rollover from my account to the Investment provider as specified in this form.
- I have read and understood the withdrawal restrictions in relation to Non-commutable Allocated Pension and MLC MasterKey Term Allocated Pension as outlined in the current Product Disclosure Statement.

Signature of Investor or Power of Attorney

Date  /  /

## HOW TO CONTACT US

### MLC Client Service Centre

If you have any questions, please contact your financial adviser, or the MLC Client Service Centre on **132 652** any business day between **8 am and 6 pm** (Sydney time).

For more details on MLC's range of products and service visit **mlc.com.au**

**Send your completed, signed and dated form to:**

**MLC Masterkey  
PO Box 200  
North Sydney NSW 2059**

