

# Lump Sum Withdrawal Request Form

The trustees of the superannuation fund request a lump sum withdrawal for the member specified in the details below.

The trustees instruct you to prepare the appropriate documentation for the lump sum withdrawal.

## Fund and member details

Superannuation Fund Name

Member Name

Is the Member claiming the tax-free threshold?      Yes      No      N/A (60+ years old)

## Lump Sum Withdrawal Details

Lump Sum Withdrawal Date:

Lump Sum Amount

Does the member have sufficient unrestricted non-preserved benefits for the lump sum withdrawal?

Yes

No

Please choose the relevant option and complete any details requested.

## Payment Form

Cash

In specie (specify below)

Asset (quantity)

Amount (market value)

If you need more space, attach a separate lists.

Please note that we will also need signed off market transfer forms or portfolio reports for any in-specie transfers.

Trustee 1:

Signed:

Date:

Trustee 2:

Signed:

Date:

Trustee 3:

Signed:

Date:

Trustee 4:

Signed:

Date:

Trustee 5:

Signed:

Date:

Trustee 6:

Signed:

Date:

or

## Adviser Authority

Adviser:

Signed:

Date: