CHARTERED ACCOUNTANTS™
AUSTRALIA + NEW ZEALAND

SuperGuardian™
Superannuation administration made simple!

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: _____ Trustee 2: _____

Signed: _____ Date: / / Signed: _____ Date: / /

Trustee 3: _____ Trustee 4: _____

Signed: _____ Date: / / Signed: _____ Date: / /

Trustee 5: _____ Trustee 6: _____

Signed: _____ Date: / / Signed: _____ Date: / /

or

Adviser Authority

Adviser: _____

Signed: _____ Date: / /