

## Condition of release form

Use this form to advise us of your condition of release so you can transfer your preserved super funds to an Investment account, non-commutable pension account or allocated pension (retirement phase) account.

Please print in CAPITAL LETTERS and place a cross  in any applicable boxes.

### 1. Personal details

Account number  Client number

Product type

Title  Date of birth

Surname

Given name(s)

### 2. Condition of release

- Generally, you can only access your preserved super when:
- you are permanently retiring after reaching your preservation age (see table below for your preservation age), or
  - you stop employment at age 60 or over, or
  - you reach age 65, or
  - you reach preservation age, but you do not retire or stop working and you purchase a non-commutable<sup>1</sup> income stream, for example, a non-commutable allocated pension.

<sup>1</sup> A non-commutable lifetime income stream is an annuity or pension that you cannot cash in. However, you may be able to cash certain non-commutable income streams that you purchased for 'transition to retirement', once you meet another release condition such as permanent retirement.

#### Relevant preservation age

Date of birth	Preservation age
Before 1 July 1960	55 years
1 July 1960 – 30 June 1961	56 years
1 July 1961 – 30 June 1962	57 years
1 July 1962 – 30 June 1963	58 years
1 July 1963 – 30 June 1964	59 years
After 30 June 1964	60 years

### 2. Condition of release continued

**!** Preserved funds can only be transferred where conditions of release rules are satisfied.

#### For transfer of preserved funds from your superannuation account to an investment or pension account (if applicable)

I've met the following condition of release as specified in the relevant **product disclosure statement**:

- Retirement—I'm aged 55 or over and have permanently retired (working less than 10 hours per week).
- Retirement—I'm aged 60 or over and have ceased an employment arrangement.

Date you ceased an employment arrangement

- I've reached preservation age but haven't retired (non-commutable allocated pension only).
- Permanent incapacity as defined by the *Superannuation Industry (Supervision) Act 1993*<sup>2</sup>
- Severe financial hardship<sup>2</sup>
- Compassionate grounds<sup>2</sup>

<sup>2</sup> Special conditions and requirements apply, please speak to your financial adviser, or contact us at the North Service Centre on 1800 667 841.

#### For transfer of a non-commutable allocated pension account to an allocated pension (retirement phase) account (if applicable)

I've retired or met the following condition of release:

- I've reached preservation age and have permanently ceased employment and never intend to work more than 10 hours per week

Date you permanently ceased employment

- I'm aged between 60 and 64 and have ceased an employment arrangement

Date you ceased an employment arrangement

### 3. Declaration and signature

- I declare that I've fully read this form and the information I've completed is true and correct.
- I request the trustee (NM Superannuation Proprietary Limited) to action this request.

#### For non-commutable allocated pension accounts (if applicable)

I understand that by making this declaration:

- the value of the allocated pension account will be included in my transfer balance cap, and
- no tax will be deducted on investment earnings.

Member name (Print in CAPITAL LETTERS)

Signature of member

Date

### 4. Checklist

- Have you completed all relevant sections of this form?
- Have you read and understood the declaration?
- Have you signed and dated the form where indicated?

#### Where to send this form

Email, mail or fax or this completed form to:

north@amp.com.au  
North Service Centre  
GPO Box 2915  
MELBOURNE VIC 3001  
1800 071 329

**Any questions?**  
1800 667 841