



Phone: 1300 754 748

WITHDRAWAL FORM RAIZ INVEST SUPER: RETIREMENT

Instructions: Please fill in Sections 1, 2 and 3 on your device and print this form.
Once you have signed Section 4 please email a scanned copy of the form to support@raizinvest.com.au

Member number

1. PERSONAL DETAILS

Title First name* Middle name

Last name* Date of birth (DD/MM/YYYY)* Gender* M F

Street Address/PO Box*

Suburb/Town* State* Postcode* Home phone number

Personal email address Mobile phone number*

Tax File Number

Amount to transfer Entire Balance Partial Amount \$

2. CONDITION OF RELEASE

In order for you to withdraw your funds from your RAIZ Invest Super you must meet one of the conditions of release set out below.
For more info please refer to the Super FAQ section on our website for more info.

I have reached my preservation age and have permanently retired

I am over age 60 and have ceased employment

I am over 65

3. PAYMENT INFORMATION

Name of Account Financial Institution BSB Account Number

Important information

Instructions – Fully complete all sections and return this form to the above address

- Please ensure all sections are fully completed.
- If you are withdrawing your entire balance:
 - and you have insurance cover as part of your RAIZ Invest Super fund this will cease once you transfer to another fund.
 - and your employer has previously paid contributions to RAIZ Invest Super please ensure that they have paid their final contribution.
 - and you intend to claim a tax deduction for contributions made this will need to occur prior to us making payment to you.
- Please ensure that the details provided in the Payment Info section are correct.
- You will need to provide proof of identity for us to process your request. This can be a certified copy of:
 - Drivers licence issued under State or Territory Law or
 - Passport
- The following can certify copies of the originals as true and correct copies:
 - A permanent employee of Australia Post with 5 or more years of continuous service.
 - A finance company officer with 5 or more years of continuous service (with one or more finance companies)
 - An officer with, or authorized representative of, a holder of an Australian Financial Services Licence (AFSL), having 5 or more years of continuous service with one or more licensees.
 - A notary public officer
 - A police officer
 - A registrar of a court
 - A Justice of the Peace or
 - A solicitor

4. MEMBER AUTHORISATION

Member to sign here

Full name (print in BLOCK letters)*

Date (DD/MM/YYYY)*

Please return the form to support@raizinvest.com.au