

Step 3: Select your option

Note: Depending on your employment status, the benefit options may vary.

Please select () one of the benefit options below:

Resignation benefit

- I am under 55 and have ceased employment with my defined benefit employer.
 - Option 1: Lump sum and deferred benefit
 - Option 2: Deferred lump sum and deferred fortnightly lifetime pension
 - Option 3: Deferred benefit only

If you select Option 1, complete step 4 and the deferred lump sum will be transferred to a deferred account. If you select Option 2 or Option 3, these benefits will be maintained for you in a deferred account. Accessing any deferred components are subject to fund and preservation rules. You do not need to complete the Payment distribution instructions in Steps 4 to 8. Go directly to Step 9.

OR

Retrenchment benefit

- I am under 55 and been made redundant (genuine redundancy) from my Defined Benefit employer:
 - Option 1: Lump sum only
 - Option 2: Lump sum and deferred fortnightly lifetime pension

If you select Option 2, the deferred fortnightly pension will be transferred to a deferred account.

OR

Retirement benefit

- I am over 55 and have ceased employment with a defined benefit employer but not retired from the workforce
- I have reached my preservation age and permanently retired from the workforce
- I am aged 65 years or over:
 - Option 1: Lump sum only
 - Option 2: Lump sum and fortnightly lifetime pension

OR

Forfeiture benefit

- I'm still working for a defined benefit employer, but wish to close my account.

If you close (forfeit) the scheme, both options (lump sum or lump sum and fortnightly pension will be transferred to a deferred account.

Step 4: Payment instructions ~~ROPSNEW~~

Note

Proof of identity

We require proof of your identity before we can pay your benefit. If you have already provided proof of identity you do not have to provide it again, as long as you don't change your name or the bank account you've nominated to receive payments and withdrawals. If either of these have changed you must provide proof of identity in order for us to verify the change(s):

Change of name

If you have changed your name, you must provide a certified copy of one of the following name change documents:

- marriage certificate or certificate of registration (if you are on the relationship register) issued by the Births, Deaths and Marriages Registration Office (ceremonial certificates cannot be accepted)
- deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office. If you have reverted to your maiden name, we will require your marriage certificate (from the Births, Deaths and Marriages Registration Office) showing your original maiden name and your married name.

Change of bank account details

You need to provide proof of identity documents when setting up or updating the bank account you're nominating to receive payments into. You can provide your identification for electronic verification in the proof of identity step of this form. Alternatively, you can provide certified proof of identity, refer to the acceptable documents list below.

Acceptable documents and certification

Providing electronic proof of your name, you can provide a certified copy of your identification documents (or electronically) if you have provided a certified copy of your passport (these documents are acceptable for electronic verification).

Certification of personal documents

All copied pages of original personal identity documents (including any change of name documents) must be certified as true copies by an authorised person with the appropriate qualifications or registration (see below) who cannot be the owner or addressee of the document. The authorised person must sight the original and the copy to ensure the documents are identical, then certify each page by writing "I certify that this document is a true copy of the original", followed by their signature, printed name, address, qualification (e.g. justice of the peace, Australia Post employee), registration number (if applicable) and date.

If you are in Australia

The following lists a subset of people who are authorised to witness your signature on a statutory declaration as well as certify copies of original documents. For a complete list of authorised witnesses/certifiers, go to the Attorney-General's Department website at www.ag.gov.au.

- Australia Post employee in charge of an office providing postal services (charges may apply)
- chiropractor
- dentist
- Financial adviser or financial planner
- full-time or part-time teacher employed at a school or tertiary institution
- justice of the peace
- legal practitioner
- magistrate
- medical practitioner
- nurse
- optometrist
- pharmacist
- physiotherapist
- police officer
- psychologist
- veterinary surgeon

I certify that this document is a true copy of the original.

Name: Kate Anderson
Address: 6 Some St Suburb NSW 2000
Qualification: JP
Registration number: 123456
Date: 1 November 2023

If you are outside Australia

The following people can certify copies of the originals:

- consular staff at an Australia Embassy, High Commission or Consulate
- a public notary or other person authorised to administer an oath or a affirmation or to authenticate documents in the country you are visiting or living in.

The professions listed under If you are in Australia can only certify documents outside Australia if they work or are registered in Australia. Where your documents are certified outside Australia, the certifier must quote their registration number or the relevant law that qualifies them to authenticate your documents.