



wa super

Converting your Transitional Income Stream Account to an Income Stream Account

Complete this form in pen using CAPITAL letters. Where applicable complete boxes with an **X**

SECTION 1 - YOUR PERSONAL DETAILS

Client number

Last name

Mr

☐

Mrs

☐

Miss

☐

Ms

☐

Dr

☐

First name/s

Male

☐

Female

☐

Date of birth (DD/MM/YYYY)

 / /

Postal address

Suburb/town

State

Postcode

Street address (if different to postal address)

Suburb/town

State

Postcode

Home phone

Day time phone

Mobile

Email

SECTION 2 - CONDITION OF RELEASE

Please select one of the situations below that is relevant to you.

- ☐ I have reached my preservation age and I have permanently retired and never intend to become gainfully employed for 10 or more hours per week.
- ☐ I am aged between 60 and 64 years of age and have ceased gainful employment with an employer on or after the age of 60.
- ☐ I am aged 65 or over.
- ☐ I am permanently incapacitated and am receiving a Total and Permanent Disablement benefit. You must have lodged a valid claim through WA Super.

SECTION 3 - CONVERSION TO A PENSION INCOME STREAM

If you satisfy a condition of release, do you want to convert your Transitional Income Stream Account to an Income Stream Account?

- ☐ Yes, I wish to convert my Transitional Income Stream Account to an Income Stream Account.

Please note:

1. Your investment option(s) will automatically transition to the equivalent tax-free investment options.
2. Your client number will remain the same and you will be still be able to access member online using the same log-on details.
3. From 1 July 2017, a \$1.6 million transfer balance cap will apply on the total amount of superannuation you can transfer into the tax-free retirement phase. This is regardless of how many accounts you hold and how many times you transfer money into retirement phase. Subsequent earnings on balances in the retirement phase do not count towards the cap. Amounts above the cap can remain in an accumulation account (where earnings are taxed at 15 per cent) or outside the superannuation system. If you transfer an amount into retirement phase in excess of the cap you will be required to remove the excess, including the notional earning on the excess. If you choose not to, the Fund will be required to remove the excess on your behalf.

SECTION 4 - YOUR PRIVACY

Your privacy is important to us. Details on how your personal information is collected, managed and used is contained in our Privacy Policy which includes our Privacy Collection Statement and is available at www.wasuper.com.au/privacy/.

SECTION 5 - ACKNOWLEDGEMENT AND DECLARATION

In signing this form, I declare that:

- My Transitional Income Stream Account will be converted to an Income Stream Account.
- All information provided by me on this form is correct.
- I acknowledge that I have received a copy of the Retirement Solutions Product Disclosure Statement and have read and considered all information contained within before making any decisions and understand the terms of my membership.
- I will be bound by the Fund's Trust Deed and Rules in all respects.
- I understand that the value of my funds is not guaranteed. The value of investments may rise and fall and I may not get back the amount originally invested due to investment fluctuations and the deduction of applicable taxes and fees.
- If I am uncertain about any aspects of my request to convert my Transitional Income Stream Account to an Income Stream Account, or the most appropriate investment strategy for my personal needs, I will seek professional financial advice from a licensed financial adviser beforehand.
- I acknowledged that by supplying my email address, I will receive information regarding the Fund via email. I am able to unsubscribe at any time.
- I have read and understood the Fund's Privacy Policy including the Privacy Collection Statement which is available at www.wasuper.com.au/privacy. I understand how WA Super will collect, use and disclose my personal information.

Signature

Date

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