

## Family law payment instructions

**NOTE:** if you want to retain your benefit within HESTA for Mercy Super, you do not need to complete this form (an account will be automatically set up for you as part of the split instructions).

If an account is created for you in accordance with instructions received in a court order or an agreement with your former partner who is a HESTA for Mercy member, you can make a cash withdrawal (if eligible) from your account or rollover part or all of your super to another super fund.

You can also choose to leave your entitlements in the HESTA for Mercy account that has been established for you – the choice is yours.

### Confirmation of entitlement

If you're looking to withdraw your HESTA for Mercy entitlements established as part of a family law arrangement, you will need to provide us with the details of your former partner's HESTA for Mercy account details to help us validate the entitlements.

### Eligibility to make a cash withdrawal

Your super is a long-term investment designed to support you in retirement. Because of this, there are strict rules that govern when you can access your super which are known as a condition of release. You are eligible to make a cash withdrawal when you:

- Have reached your preservation age and are permanently retired
- Have reached age 60 or above and stopped working with your employer
- Are aged 65 or over
- Are withdrawing an amount from the unrestricted non-preserved component of your super
- Are accessing your total benefit less tax which is less than \$200 after ceasing employment with your employer
- Have been approved release due to permanent incapacity or terminal illness.

### Preservation Age

The table below provides your preservation age depending on your date of birth.

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

### Provide proof of identity and copy of bank statement required for cash withdrawal

If you're eligible and are looking to make a cash withdrawal from your super, you will need to provide certified proof of your identity along with a copy of your bank statement to demonstrate that the account receiving the payment is in your name along with your completed *Family law payment instructions* form (attached).

This is to make sure the instructions are coming from you and any payment is being made to a bank account in your name.

### Rolling over part or all of your super to another fund

To enable us to rollover part or all of your HESTA for Mercy account to another super fund you will need to complete and return the attached Family law payment instructions form with the following details for the other super fund:

- Fund name and your membership number in the other fund
- Contact address for the other fund
- The Australian Business Number (ABN) and/or Unique Superannuation Identifier (USI) of the other fund, or an Electronic Service Address if you are rolling your super into a Self-Managed Super Fund. If the fund you want to transfer your super to doesn't have an ABN you will need to contact the fund directly to request evidence of their complying status, such as their notice of compliance.

## contact us

1300 368 891 | [Email form to information@hestaformercy.com.au](mailto:information@hestaformercy.com.au) or mail to: PO Box 8334, Woolloongabba QLD 4102



# Family law payment instructions

## COMPLETE SHADED SECTIONS

Please complete in **BLOCK LETTERS** using a **BLACK** or **BLUE** pen and ensure it is signed and dated.  
Use this form to make a cash withdrawal from or rollover part or all of your super to another fund following the split of the super benefit of a HESTA for Mercy member in accordance with instructions received in a court order or agreement.

**NOTE:** if you want to retain your benefit within HESTA for Mercy, you do not need to complete this form (an account will be automatically set up for you as part of the split instructions).

**!** **IMPORTANT:** Complete ALL details. This is needed to validate your identity and get in touch if we have any questions.

### 1. Your personal details

Member Number	Your name (First name and surname)		
<input type="text"/>	<input type="text"/>		
Date of birth	Mobile or daytime telephone		
<input type="text" value="DD"/> / <input type="text" value="MM"/> / <input type="text" value="YYYY"/>	<input type="text"/>		
Residential Address (must be provided - PO Box not accepted)			
<input type="text"/>			
Suburb	State	Postcode	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Postal Address (if different from above)			
<input type="text"/>			
Suburb	State	Postcode	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Email			
<input type="text"/>			
<input checked="" type="checkbox"/>	I am an Australian or New Zealand citizen or an Australian Permanent Resident.		

### 2. Details of HESTA for Mercy member whose super is being split

Name (first name and surname)	
<input type="text"/>	
Member number	Date of birth
<input type="text"/>	<input type="text" value="DD"/> / <input type="text" value="MM"/> / <input type="text" value="YYYY"/>

Please continue over page

**!** If you're looking to make a cash withdrawal from your super and meet the eligibility conditions, complete **section 3 Cash withdrawal condition of release**.

If you're looking to transfer part or all of the proceeds from your family law split to another super fund complete **section 4 Rollover to another super fund**.

### 3. Cash withdrawal condition of release

Which of the following conditions applies to enable you to make a cash withdrawal from your super?

- I have reached my preservation age and permanently retired
- I have reached aged 60 or above and stopped working with my employer
- I am aged 65 or over
- I am accessing my total benefit less tax which is less than \$200

#### Withdrawal amount

I want to withdraw:

- My full benefit entitlement
- An amount of \$  net of any tax payable

#### Bank account to receive your payment

**!** **NOTE:** Payments can only be made to your account or joint account to which you are a party. Please provide a copy of your bank statement as proof of your bank account details. Payment to your account cannot be made until this proof is received.

Name of institution

BSB

Account number

Account name

#### Proof of identity

To enable a cash withdrawal from your super you will need to provide proof of identity (along with a copy of your bank statement).

- I have attached the required certified proof of identity documents.

Please provide certified copies of both sides of your CURRENT driver's licence or passport. If you don't have a current driver's licence or passport refer to the *Proof of Identity* fact sheet on our website at [hestaformercy.com.au](http://hestaformercy.com.au) for a list of other documents that can be used for proof of identity or contact us on 1300 368 891.

### 4. Rollover to another super fund

#### Rollover amount

I want to rollover to another super fund:

- My full benefit entitlement
- The balance remaining after the cash withdrawal above
- An amount of \$  with any remaining amount to stay in my HESTA for Mercy account

Please continue over page

### Other super fund to receive your rollover

Member number

Fund name

Fund Address

Suburb

State

Postcode

Australian Business Number (ABN)

Unique Superannuation Identifier (USI)

Electronic service address (self managed super fund only)

**Note:**

- A transfer to another fund cannot occur without the ABN and membership number of the fund you are transferring to. If your rollover fund does not have an ABN you will need to contact the fund directly to request evidence of their complying status, such as their notice of compliance.
- For a rollover to a registered Self Managed Super Fund, please provide evidence of a bank account in your fund's name (such as a bank statement).

### Rollover using my tax file number or proof of identity



Use my tax file number (TFN)\*

We might already hold your TFN. If you're not sure if we currently hold your TFN you can choose to provide it now.

\*We're authorised under super law to collect, use and disclose your TFN. You don't have to provide your TFN, but if we have it, we'll be able to accept all types of contributions into your account, you won't pay more tax than you need to and it'll be easier to find your super. If you transfer your super to another fund, we'll give them your TFN unless you tell us not to in writing.



I've attached proof of ID

Please provide certified copies of both sides of your CURRENT drivers licence or passport. If you don't have a current driver's licence or passport refer to the *Proof of Identity* fact sheet on our website at [hestaformercy.com.au](https://hestaformercy.com.au) for a list of other documents that can be used for proof of ID or contact us on 1300 368 891.

OR

## 5. Authorisation – read, sign and date

Please arrange for the cash withdrawal or rollover of my benefit entitlements in accordance with the instructions provided on this form. By signing this form:

- I understand that my request will not be actioned if the information is incomplete or ambiguous
- I confirm I have read and understood HESTA's Privacy Collection Statement which is available at [hestaformercy.com.au/privacy](https://hestaformercy.com.au/privacy) or by calling 1300 368 891, and accept that the information on this form is true and correct to the best of my knowledge and belief. I consent to my personal information being collected and used by the Trustee for the ongoing administration of my membership by the fund administrator and other service providers.
- I acknowledge that HESTA recommends that, before I sign this form, I read and understand the Product Disclosure Statement available at [hestaformercy.com.au/pds](https://hestaformercy.com.au/pds) or by calling 1300 368 891.

Your Signature

Date

### Return your completed form

Scan and email all requirements to [information@hestaformercy.com.au](mailto:information@hestaformercy.com.au) or mail it to HESTA for Mercy, PO Box 8334, Woolloongabba QLD 4102 or drop it off in person to Potter Building, Ground Floor, Mater South Brisbane campus

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