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Fund ABN 45 960 194 277 | USI 45 960 194 277 010

APPLICATION FOR EARLY RELEASE OF SUPER DUE TO PERMANENT INCAPACITY

Complete this form to apply to make a withdrawal from your Future Super account due to permanent incapacity.

You can find detailed information about Future Super in our Product Disclosure Statement (PDS), Additional Information Booklet, Insurance Guide, Financial Services Guide and Privacy Policy, all of which can be obtained from www.myfuturesuper.com.au or on request by phoning **1300 658 422**.

This form must be posted to Future Super PO Box 1282, Albury, NSW 2640 or emailed to info@futuresuper.com.au.

Important Information about Applying for Early Release of Super due to Permanent Incapacity

The Trustee may be able to release the money held in your super account, also known as your 'superannuation benefit', if you are permanently incapacitated.

Are You Eligible?

Before you make an application to the Trustee, the first thing to do is to check if you're eligible.

'Permanent incapacity' means that illness or injury has rendered you unlikely to ever again engage in gainful employment for which you are reasonably qualified by education, training or experience.

If you have **permanently ceased all employment because of illness or injury**, you are eligible to make a claim for early release of your superannuation because of permanent incapacity.

Before you complete this form and make your application to the Trustee for early release of your superannuation benefit, it is important you read the following information. There are strict guidelines in place for assessing early release applications, and you should understand these guidelines before you submit your application.

What If You're Not Eligible?

If you have not permanently ceased all employment because of illness or injury, then you are not eligible to apply. For more information about whether another condition of release may be available to you, please contact us at info@futuresuper.com.au or on 1300 658 422.

Do You Hold TPD Insurance Cover Through the Fund?

You may hold Total and Permanent Disability (TPD) insurance cover through Future Super. If you do, you may also be eligible to apply to receive the amount that you are insured for. For more information on how to make the appropriate insurance claim, please contact us at info@futuresuper.com.au or on 1300 658 422.

Proof of Identity and Certified Copies

Interests in Future Super are issued by Diversa Trustees Limited (ABN 49 006 421 638, RSE Licence L0000635, AFS Licence 235153) as trustee of the Future Super Fund (ABN 45 960 194 277; RSE Registration R1072914).



Wherever we request certified copies you must ensure that the documents you provide have been certified correctly by an approved person.

Want Your Application To Be Assessed Quickly?

To ensure your application is assessed as soon as possible, please ensure that you complete all fields on the application form and provide all requested documents. Any missing information and/or documents will result in the assessment being delayed while we request them again.

Section 1 Personal Details

Given Name(s)	<input type="text"/>		
Surname	<input type="text"/>		
Member Number	<input type="text"/>		
Date of Birth	<input type="text"/>		
Mobile Phone Number	<input type="text"/>		
Email Address*	<input type="text"/>		
Residential Address	<input type="text"/>		
	<input type="text"/>		
City	<input type="text"/>	State	<input type="text"/>
		Postcode	<input type="text"/>

* By providing your email address, you consent and authorise us to send you communications or information, including information required by law, email or similar technologies. Your details will never be passed onto a third party other than in accordance with our Privacy Policy. You can elect to receive communications by post at any time by contacting Future Super on **1300 658 422** or via email at **info@myfuturesuper.com.au** or in writing at **PO Box 1282, Albury, NSW 2640**.

Section 2 Occupation Status

'Permanent incapacity' refers to the early release of your preserved superannuation benefit on the grounds of illness or injury which renders you unlikely to ever again engage in gainful employment for which you are reasonably qualified by education, training or experience.

Have you permanently ceased all employment? Yes No

If you answer 'no' to this question, you cannot make a claim for early release of your superannuation because of permanent incapacity.



Section 3 Diagnosis

Please list all medical conditions (illness, injury or disability) which impact on your capacity to work:

Section 4 Withdrawal Information

Do you wish to withdraw your entire account balance?* Yes No

If no, how much would you like to withdraw?

\$

* If you withdraw your entire account balance any insurance cover you hold with Future Super will cease and your account will be closed.

If approved, the withdrawal payment will be made into the account you specify below:

Account Name*

Name of Financial Institution

BSB

Account Number

* We can only make payments into an Australian bank, credit union or building society account that's in your name or held jointly in your name with another person.

Section 5 Verification of Identity

Please select **one** of the two options below.



Option 1 – I want to attach paper copies of certified ID

Please ensure that you provide photocopies of your original identification documents and that they are correctly certified. Each page must be certified as a true copy.

If the documents you provide are not correctly certified or are unable to be read you authorise us to validate your identity and perform an anti-money laundering and counter terrorism financing check using a third party green ID validation provider, including confirming your document is valid with the original document issuer.

Option 2 – I want to use electronic verification

By providing the information below, you authorise us to validate your identity and perform an anti-money laundering and counter terrorism financing check using a third party identification validation provider, including confirming your document is valid with the original document issuer.

You must provide **at least two** of the following (if you are unable to provide this information you will need to provide certified ID as per option 1):

Australian Passport Please complete the details exactly as they appear on your Passport

Passport Number	<input type="text"/>	First Name	<input type="text"/>
Last Name	<input type="text"/>	Date of Birth	<input type="text"/>
Sex	<input type="text"/>		

Medicare Card Please complete the details exactly as they appear on your Medicare Card

Card Number	<input type="text"/>	Reference Number	<input type="text"/>
First Name	<input type="text"/>	Last Name	<input type="text"/>
Date of Birth	<input type="text"/>	Card Expiry Date	<input type="text"/>

Australian Drivers Licence Please complete the details exactly as they appear on your Licence

Licence Number	<input type="text"/>	State of Issue	<input type="text"/>
First Name	<input type="text"/>	Last Name	<input type="text"/>
Date of Birth	<input type="text"/>		



Section 6 Declaration and Signature

By completing this form, I declare that:

- The information I have given on this form and accompanying information provided in the medical reports and the Statutory Declaration is true and correct.
- I have made an informed decision because I have read and understand the Future Super Product Disclosure Statements (PDS) and related documents.
- I acknowledge that the Trustee cannot provide me with financial advice about the consequences of paying out my benefit and that I should consult an appropriately qualified adviser for such advice.
- I understand that I can request appropriate information that I may reasonably require from the Fund for the purpose of understanding my benefit entitlement, including information about fees and charges that may apply.
- I accept that I am bound by the provisions of the trust deed and rules which govern the operation of Future Super.
- I have read and understood the Privacy Statement and understand how Future Super will use my personal information.

x

.....

Signature

...../...../.....

Date

.....

Print Name

PRIVACY STATEMENT: By signing this form you consent to Future Super collecting and using your personal information to manage your superannuation account and to comply with the relevant legislation. If you do not provide this information, we may not be able to accurately manage your superannuation account. Your personal information may be disclosed to other parties, including the Trustee, the Fund Promoter, the Fund's Administrator, the Fund's Insurer and professional advisers, government bodies and the trustee of any other fund to which you transfer. To access your personal information or for a copy of our Privacy Policy, visit www.myfuturesuper.com.au or phone **1300 658 422**

Processing Checklist

The Trustee will not begin assessing your application until all of the following have been received:

Form completed and signed

Verification of ID completed

Statutory declaration completed and signed

Medical reports completed by two independent registered medical practitioners

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MEDICAL REPORT FORM FOR PERMANENT INCAPACITY CLAIM

This form must be completed by a registered medical practitioner.

Member Name

Member
Number

This member has applied for the early release of their superannuation benefit on the grounds of permanent incapacity. Please complete this report as fully as possible and if necessary, provide additional sheets for further information.

The member is responsible for any costs associated with obtaining this report.

Are you the member's usual medical practitioner?

Yes

No

What is the nature of the member's present disability?

Please provide details of the member's present medical condition and, if available, the history of the disability.

When did the member first consult you regarding the disability?/...../.....

The definition of Permanent Incapacity requires the Trustee to be reasonably satisfied that the member is suffering from ill health (whether physical or mental), to such an extent that the member is unlikely, because of the ill health, to ever engage in gainful employment for which the member is reasonably qualified by education training or experience.

In your opinion, does the member meet the above definition?

Yes

No

If answering YES to the question above, from what date?

...../...../.....



I hereby certify that I have examined the above named Future Super member and that the statements made in this Medical Report are true and correct to the best of my knowledge.

Name

Qualifications

Provider Number

Phone Number

Email Address

x

.....
Signature

...../...../.....
Date

.....
Print Name



MEDICAL REPORT FORM FOR PERMANENT INCAPACITY CLAIM

This form must be completed by a registered medical practitioner.

Member Name

Member
Number

This member has applied for the early release of their superannuation benefit on the grounds of permanent incapacity. Please complete this report as fully as possible and if necessary, provide additional sheets for further information.

The member is responsible for any costs associated with obtaining this report.

Are you the member's usual medical practitioner?

Yes

No

What is the nature of the member's present disability?

Please provide details of the member's present medical condition and, if available, the history of the disability.

When did the member first consult you regarding the disability?/...../.....

The definition of Permanent Incapacity requires the Trustee to be reasonably satisfied that the member is suffering from ill health (whether physical or mental), to such an extent that the member is unlikely, because of the ill health, to ever engage in gainful employment for which the member is reasonably qualified by education training or experience.

In your opinion, does the member meet the above definition?

Yes

No

If answering YES to the question above, from what date?

...../...../.....



I hereby certify that I have examined the above named Future Super member and that the statements made in this Medical Report are true and correct to the best of my knowledge.

Name

Qualifications

Provider Number

Phone Number

Email Address

x

.....
Signature

...../...../.....
Date

.....
Print Name



EARLY RELEASE OF BENEFIT DUE TO PERMANENT INCAPACITY - STATUTORY DECLARATION

I (insert name)....., of

(insert address).....

as a

(insert occupation).....

do solemnly and sincerely declare that the information provided by me in the 'Application for Early Release of Super due to Permanent Incapacity Form' annexed to this Statutory Declaration is true and correct.

I declare that I have permanently ceased employment due to my illness/injury, resulting in my inability to be employed ever again in any capacity for which I am reasonably qualified by education, training or experience.

I make this solemn declaration by virtue of the Statutory Declaration Act 1959 as amended (the Act) and subject to the penalties* provided in that Act for the making of false statements in the statutory declarations, conscientiously believing the statements contained in the declaration to be true in every particular.

Signed

(Signature of person making the declaration) Please sign in front of an authorised witness.

Declared at

(Location)

On

(Date)

Authorised witness before me

(Name of authorised witness) Please print. Note the authorised witness must be either a Justice of the Peace, Doctor, Pharmacist or Australia Post Officer.

X.....

(Signature of authorised witness)

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X.....

(Qualifications of authorised witness)

* A person who intentionally makes a false statement in a Statutory Declaration made under the Statutory Declaration Act 1959 (as amended) is guilty of an offence against this Act, the punishment for which is a fine not exceeding \$200 or imprisonment for a term not exceeding 6 months or both if the offence is prosecuted summarily, or imprisonment for a term not exceeding four years if the offence is prosecuted upon indictment.