

# VicSuper Flexible Income (with Transition to Retirement feature) retirement declaration

When completing this form, please ensure you use all capital letters eg    and check boxes with a cross eg

### Important information

- Only complete this form if you are under age 65. You don't need to complete this form if you are age 65 or over.
- If you have reached your preservation age and have permanently retired from the workforce or have ceased an employment arrangement since turning age 60, please complete this form to change the preservation status of your VicSuper Flexible Income (with Transition to Retirement feature) account from preserved and/or restricted non-preserved, to unrestricted non-preserved. By doing this, the Transition to Retirement feature restrictions will no longer apply and you will be able to make lump sum withdrawals from your account at anytime.
- If you are currently invested in the term deposit Option that commenced after 1 July 2017, the term deposit will be terminated on your behalf when removing the Transition to Retirement feature restrictions from the account. An interest adjustment in the form of a reduction in accrued interest may apply where a term deposit is terminated before maturity.
- As at the date the Transition to Retirement feature is no longer applicable, the account balance will be counted towards the 'transfer balance' cap, initially set at \$1.6 million.
- Your account balance will be transferred to equivalent investment option/s whose investment earnings are exempt from tax. The account balance and proportion of investment option/s will remain the same on the date of the transfer. Please refer to the *VicSuper Flexible Income Product Disclosure Statement (PDS)* for further information.
- To obtain a withdrawal form please call our Member Centre on **1300 366 216**.
- If you have any questions about this form or your VicSuper Flexible Income account, please call our Member Centre on **1300 366 216** or visit [vicsuper.com.au](http://vicsuper.com.au)

### Step 1: Personal details

Member number	VS	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Title	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Ms	<input type="checkbox"/> Miss	<input type="checkbox"/> Other ( <i>please specify</i> )	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Surname	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Given name/s	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Postal address	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Postcode	<input type="text"/>
Daytime Phone number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Mobile number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of birth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female

### Step 2: Sign this retirement declaration

I confirm that I am over preservation age and have permanently retired from the workforce (ie intend to never again become gainfully employed for 10 or more hours per week).

**OR**

I confirm that I have ceased an employment arrangement since turning age 60.

Signature

Date

**Step 3:**  
Privacy information

The personal information provided on this form is collected by and held for First State Super, in accordance with the Australian Privacy Principles of the *Privacy Act 1988 (Cth)*, for the purpose of administering accounts and providing services associated with fund membership. For further information about how personal information is handled, please call us on **1300 366 216** or visit [vicsuper.com.au/privacy](https://vicsuper.com.au/privacy) to view the privacy policy (a hard copy of the policy may also be provided on request). The policy contains information about access to and correction of personal information, how a complaint can be made about a privacy breach and other important information about how personal information is collected, used and disclosed.

**Step 4:**  
Sign and return  
this form

I declare that:

- all personal details on this form are correct.
- I have received and read the Fund's privacy information. See Step 3.
- I have fully read the terms and conditions regarding membership in the *VicSuper Flexible Income PDS* and understand that this is not financial advice. To have a current *VicSuper Flexible Income PDS* sent to you, please contact our Member Centre on **1300 366 216**.

I understand:

- that if I am currently invested in the term deposit Option that commenced after 1 July 2017, the term deposit will be terminated on my behalf. I understand that an interest adjustment in the form of a reduction in accrued interest may apply where a term deposit is terminated before maturity.
- as at the date the Transition to Retirement feature is no longer applicable, the account balance will be counted towards the 'transfer balance' cap, initially set at \$1.6 million.
- that the account balance will be transferred to equivalent investment option/s whose investment earnings are exempt from tax. The account balance and proportion of investment option/s will remain the same on the date of the transfer.

Signature

Date

**Step 5:**  
Send your  
form to us

Send your completed form to:  
**VicSuper, GPO Box 89 Melbourne Vic 3001**