

# HESTA income stream lump-sum withdrawal form



Use this form to make a lump-sum withdrawal from your HESTA Income Stream or Transition to Retirement Income Stream (if eligible). Please consult a financial adviser before making a decision.

## Complete this form if you would like to make a lump-sum withdrawal from your HESTA Income Stream account.

Type in your details or complete in pen using BLOCK letters. Print 'X' to mark boxes where applicable. The form must be completed in full. Call us on 1300 734 479 if you have any questions.

### 1 Personal details

Member number:

Title: Ms  Mrs  Miss  Mr  Dr  Other

Given name/s:

Family name:

Date of birth:

Postal address:

PO Box/Unit number/Street number

Street name

Suburb

State/Territory

Postcode



Phone number:

Email:

### 2 Nominate withdrawal type

#### ! Select one option only.

I would like to rollover my entire income stream account balance to another fund - complete sections 5 and 6

OR

I would like to rollover part of my income stream account balance to another fund - complete sections 4, 5 and 6

OR

I would like to withdraw my entire income stream account balance - complete sections 3, 5 and 6

OR

I would like to withdraw part of my income stream account balance - complete sections 3, 4, 5 and 6

\*Only applicable to Transition to Retirement members.

### 3 Transition to Retirement members

Transition to Retirement members are only eligible for a cash withdrawal if they can select one of the following options:

I have reached preservation age and permanently retired.

Date left employer:

I am aged 60-64 and I have ceased employment, with any employer, since turning age 60\*

Date left employer:

I am aged 65 or more\*

I wish to withdraw all my unrestricted non-preserved benefits

! If you have never been employed, preserved benefits cannot be paid until you reach age 65.

Please indicate here if you have never been employed

\* If you meet this requirement, your Transition-to-retirement income stream will be converted to a retirement income stream. Consider getting financial advice about what this means for you before withdrawing.

Important note: Your preservation age will be dependent on your date of birth (see 'other information about taxation of benefits' page for your preservation table in *Income Stream PDS* available at [hesta.com.au/ispds](http://hesta.com.au/ispds)). Also if you have never been employed, benefits cannot be paid until you reach age 65.

### 4 Partial withdrawal amount

Nominate the amount you wish to withdraw, specifying the investment options from which the withdrawal should be made. Please note, we will not recalculate the amount of your ongoing regular income payments until the next 1 July.

Note: The minimum partial withdrawal you can make from any investment option is \$1,000 unless you are withdrawing your entire balance. A minimum balance of \$6,000 overall must be maintained in your account after your withdrawal has been processed. If the investment option you specify below does not have adequate funds to complete your request, the amount requested will be drawn from the option with the highest account balance.

I wish to withdraw a total of \$

from the investment option(s) specified below:

Investment options	Amount	% of total
Conservative	\$ <input type="text"/>	<input type="text"/> %
Balanced Growth ( <i>My Super</i> )	\$ <input type="text"/>	<input type="text"/> %
Indexed Balanced Growth	\$ <input type="text"/>	<input type="text"/> %
Sustainable Growth	\$ <input type="text"/>	<input type="text"/> %
High Growth	\$ <input type="text"/>	<input type="text"/> %
Cash and Term Deposits	\$ <input type="text"/>	<input type="text"/> %
Diversified Bonds	\$ <input type="text"/>	<input type="text"/> %
Property and Infrastructure	\$ <input type="text"/>	<input type="text"/> %
International Shares	\$ <input type="text"/>	<input type="text"/> %
Australian Shares	\$ <input type="text"/>	<input type="text"/> %
<b>TOTAL</b>	\$ <input type="text"/>	<input type="text"/> %

(Total must add up to 100%)

! Withdrawing money from the HESTA Income Stream may have tax implications. We strongly recommend you speak to a financial adviser before making any decisions.

## 5 Advise us where to pay your withdrawal

### **!** Select one option only.

I would like my withdrawal paid to the nominated bank account into which my HESTA income payments are made

OR

I would like to transfer my withdrawal to the rollover fund(s) nominated below\*

Fund name:

  

Fund address:

PO Box/Unit number/Street number

Street name

Suburb

State/Territory

Postcode

Phone number of new fund:

Fund ABN/ACN (mandatory):

Unique Superannuation Identifier (USI):

Superannuation Product Identification Number (SPIN):

New fund member number (mandatory):

\*A rollover fund can be a superannuation fund or another income stream. If you have nominated more than one rollover fund, please attach details of each fund to this form and the proportion (percentage) of the payment that should be allocated to each.

Electronic service address (ESA):  
(self managed super funds only)

## 6 Member declaration

- I declare I am the HESTA Income Stream member whose details appear on this form.
- I confirm the details I have supplied are true and correct, particularly confirming any declaration in section 3. I request HESTA to pay the benefit in accordance with the provisions of the HESTA Trust Deed available at [hesta.com.au/disclosures](https://hesta.com.au/disclosures) (subject to any preservation requirements that might apply).
- I have read and understood HESTA's Privacy Collection Statement which is available at [hesta.com.au/privacy](https://hesta.com.au/privacy) or by calling 1300 734 479. 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 HESTA has advised me to consider obtaining financial advice.
- I understand if I do not provide you with the information requested in this form, you may not be able to accept or carry out my requests or instructions.
- I confirm I have read and understood the *Income Stream Product Disclosure Statement* available at [hesta.com.au/ispds](https://hesta.com.au/ispds) or by calling 1300 734 479.

Signature:

Date:

### Return your completed form

Scan and email all requirements to [hestais@hesta.com.au](mailto:hestais@hesta.com.au) or mail to: HESTA, Locked Bag 5136, Parramatta NSW 2124

If you have any questions about completing this form, call us on 1300 734 479 between 8.00am and 8.00pm (AET).

We cannot accept faxed requests.

## contact us

[hestais@hesta.com.au](mailto:hestais@hesta.com.au) | 1300 734 479 | Email form to [hestais@hesta.com.au](mailto:hestais@hesta.com.au) or mail to: HESTA, Locked Bag 5136, Parramatta NSW 2124

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