HESTA income stream lump-sum withdrawal form

Clear form

HESTA

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. 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

Gender: F ☐ M ☐

Given name/s:

Family name:

Date of birth:

D D M M Y Y Y Y

Residential address:
PO Box/Unit number/Street number

Street name

Suburb

State/Terr. 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 am still employed and wish to access my available 'unrestricted non preserved' benefits

☐ I have reached preservation age and permanently retired.
Date left employer: D D M M Y Y Y Y

☐ I am aged 60-64 and I have ceased employment, with any employer, since turning age 60
Date left employer: D D M M Y Y Y Y

☐ I am aged 65 or more

☐ I wish to withdraw my unrestricted non-preserved benefits (partial payment only)

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

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). 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	$		%
Balanced Growth *(My Super)*	$		%
Indexed Balanced Growth	$		%
Sustainable Growth	$		%
High Growth	$		%
Cash and Term Deposits	$	**OR**	%
Diversified Bonds	$		%
Property and Infrastructure	$		%
International Shares	$		%
Australian Shares	$		%
TOTAL	$ 0		0 %

(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/Terr. Postcode

Phone number of new fund:

Fund ABN/ACN (mandatory):

Unique Superannuation Identifier (USI):

Superannuation Product Identification Number (SPIN):

New fund member number (mandatory):

Cheque to be made payable to:

*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.

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 (subject to any preservation requirements that might apply).
- I have read and understood the HESTA Privacy Collection Statement and consent to the trustee of HESTA collecting, using and disclosing my personal information.
- 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 Product Disclosure Statement available at **hesta.com.au/pds**

Signature:

Date: D D M M Y Y Y Y

Return your completed form

Scan and email all requirements to **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).

contact us

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

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