



# Early release application – compassionate grounds

# HESTA

Use this form to apply for an early release cash withdrawal from your super account on compassionate grounds **once you have received a letter of approval from the Australian Taxation Office (ATO).**

Type in your details or complete in pen using CAPITAL LETTERS. Print 'X' to mark boxes where applicable. **The form must be completed in full.**

## 1. Personal details

Member number

Your name (Given name/s and Family name)

Date of birth

 /  / 

Mobile or daytime phone number

Residential address (PO Box not accepted)

Suburb

State/Terr.

Postcode

Postal address (only complete if different from above)

Suburb

State/Terr.

Postcode

Email

## 2. Payment instructions

**How much would you like us to pay you? You can choose the total amount the ATO has approved for you or a lesser amount.**

Please pay me:

☐ the total ATO approved amount

or

☐ a lesser amount of: \$

**Note:** the amount requested cannot be more than the amount approved by the ATO. If you choose a lesser amount than what's approved by the ATO, no additional payment will be made at a later date.

The amount is paid and taxed as a lump sum. If you're aged under 60 the amount will be taxed between 17% and 22%. If you're aged over 60, the amount will be tax-free.

## 3. Bank account details

**Payment will only be paid via electronic funds transfer (EFT). Provide all details as requested below.**

Bank name/financial institution:

Name of bank account holder:

**Note:** Your nominated bank account must be held in your name or, if it is a joint account, you must be one of the account holders.

BSB:

Bank account number:

**!** Please ensure the information you have provided is correct as it may not be possible to recover your money if it is paid to an unintended recipient. HESTA will not verify your bank details.

#### 4. Proof of identity

##### Proof of identity


Please ensure you provide your identification requirements per the enclosed *Certifying your identification* form. Any missing information will cause a delay in your payment.

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

#### 5. Member declaration

- I confirm the details I have supplied are true and correct and instruct the trustee of HESTA to process my request in accordance with the provisions of the HESTA Trust Deed available at [hesta.com.au/disclosures](https://hesta.com.au/disclosures) or by calling 1800 813 327.
- I acknowledge that, before I sign this form, I have read and understand the *HESTA Product Disclosure Statement* available at [hesta.com.au/pds](https://hesta.com.au/pds) or by calling 1800 813 327.
- I understand if I do not provide you with all the information requested in this form, you may not be able to accept or carry out my request.
- I confirm that the bank account is in my name (or jointly) and the details provided above are correct.
- I understand that if I haven't provided prior instructions on my intention to claim a tax deduction or split eligible contributions with my spouse, I may not be able to claim a tax deduction or split the withdrawn contributions in the future.
- I understand that if I'm withdrawing my full account balance my insurance will cease and my HESTA account will be closed.
- If I've provided my contact details on this form, the Trustee may, at its discretion, use these details to update any existing information on my member record and use this in future communications with me.
- 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 1800 813 327. 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.
- By providing my email address and/or phone number, I nominate those as my up-to-date contact details, and consent to HESTA providing me with information about HESTA's products and services, as well as marketing communications including third party products and services.

Signature



Date

DD

/

MM

/

YYYY

Return your completed and signed form to [hesta@hesta.com.au](mailto:hesta@hesta.com.au) or mail to: **HESTA, Locked Bag 35007, Collins St West VIC 8007.** If you have any questions about completing this form, call us on 1800 813 327 between 8.00am and 8.00pm (AET) Monday to Friday.

## contact us

[hesta@hesta.com.au](mailto:hesta@hesta.com.au) | 1800 813 327 | Locked Bag 35007, Collins St West VIC 8007 | [hesta.com.au](https://hesta.com.au)

Issued by H.E.S.T. Australia Ltd ABN 66 006 818 695 AFSL 235249, the Trustee of HESTA ABN 64 971 749 321. This information is of a general nature. It does not take into account your objectives, financial situation or specific needs so you should look at your own financial position and requirements before making a decision. You may wish to consult an adviser when doing this. The target market determination for HESTA products can be found at [hesta.com.au/TMD](https://hesta.com.au/TMD). Before making a decision about HESTA products you should read the relevant Product Disclosure Statement (call 1800 813 327 or visit [hesta.com.au/pds](https://hesta.com.au/pds) for a copy), and consider any relevant risks (visit [hesta.com.au/understandingrisk](https://hesta.com.au/understandingrisk)). Please refer to the Privacy Policy and Privacy Collection Statement at [hesta.com.au/privacy](https://hesta.com.au/privacy) for details about how HESTA collects, uses and discloses personal information.



# certifying your identification



Name:

Member number (if known):

## Proving your identity

You need to provide us with identification documents. This is to protect you from the risk of identity fraud, and to ensure your super is paid to you. There are three ways you can provide us with your identification. You can:

1. provide document details and your consent for us to verify your identity electronically, or
2. scan your certified identification documents and email all requirements to: [hesta@hesta.com.au](mailto:hesta@hesta.com.au), (you will need to provide a copy of a bank statement issued within the last three months if you select this option), or
3. provide certified documents in hard copy and mail all requirements to **HESTA, Locked Bag 35007, Collins St West VIC 8007**.

**Your ID and account details must match** - if you need to change your name, you'll need to provide a completed *Change of member details* form which can be found at [hesta.com.au/forms](https://hesta.com.au/forms)

Option 1: Electronic proof of identity

If you select this option you do not have to attach any certified documents. We will do all the checks for you.

X

Electronic verification

Please provide at least **TWO** of the following for verification.

Full name as appears on my Medicare card:

My Medicare number is:

Exp. date:

M

M

Y

Y

Y

Y

I am person number on this Medicare Card

Full name as appears on my Australian driver licence:

My Australian driver licence number is:

Card number: see *Driver licence card number* under Proof of identification at [hesta.com.au/forms-brochures](https://hesta.com.au/forms-brochures)

Exp. date:

D

D

M

M

Y

Y

Y

Y

State of issue:

Full name as appears on my Australian passport:

My Australian passport number is:

Exp. date:

D

D

M

M

Y

Y

Y

Y

Place of birth:

Family name at birth (not shown on your passport):

Option 2: Provide certified copies of ID documents

This step-by-step guide details the types of documents we can accept as proof of your identity and what you need to do to certify them correctly.

X

Hard copy verification

If you select this option you must attach all certified documents.

!

If you decide to email your requirements, you will need to include a copy of a bank statement issued within the last three months.

## Acceptable documents

### Either

- A certified copy of a primary photographic identification document:
- current photographic driver licence issued under state or territory law (copy of the front and back)
  - current passport (including English translation where required).

### or

- A certified copy of a primary non-photographic identification document:
- birth certificate
  - citizenship certificate issued by the Commonwealth of Australia
  - pension card issued by Centrelink that entitles you to financial benefits.

### and

- A certified copy of a secondary identification document:
- a notice issued by a local government body or utilities provider within the preceding three months that shows your name and residential address
  - a notice issued by Commonwealth, state or territory government within the past 12 months that shows your name and residential address. For example:
    - Tax Office notice of assessment
    - a notice recording the provision of financial benefits i.e. a Centrelink assistance payment.

Verification of identification

Option 1: I confirm that I am authorised to provide the personal details presented and by signing below I consent to the Trustee for HESTA verifying my identification via electronic means and to my information being checked with the document issuer or official record holder via third party systems for the purpose of confirming my identity.

Option 2 (optional): This section is optional where Option 2 is selected above. Where option 2 is selected, by signing below I confirm that I am authorised to provide the personal details presented and that in the event my certified documents have not been correctly certified or cannot be read, I consent to the Trustee for HESTA verifying my identification via electronic means and to my information being checked with the document issuer or official record holder via third party systems for the purpose of confirming my identity.

Signature:

Date:

D

D

M

M

Y

Y

Y

Y

Page 1 of 2

## Have you changed your name or are you signing on behalf of another person?

If you've changed your name you'll need to provide a certified linking document proving a relationship exists between two (or more) names.

For a change of name you can request linking documents (eg Marriage certificate, Deed poll, Change of name certificate, Divorce decree or Registered relationship certificate) from the Births Deaths and Marriages Registration Office.

If you are signing on behalf of the applicant, you will need to provide Guardianship papers or Power of Attorney documents.

**If you can't provide the identification documents we've asked for, give us a call on 1800 813 327 to discuss alternatives.**

## How to certify

The person authorised to sight and certify documents must:

- sight the ORIGINAL and the copy and make sure they are identical, and
- write or stamp 'certified true copy' on all copied pages followed by their signature, printed name, qualification (e.g. Justice of the Peace), registration number (if applicable) and date.

## What does a certified document look like?

Samantha Sample has provided a photocopy of her identification that included signature, full name, date of birth, and current residential address.

- The certifying authority has sighted the original identification, and confirmed that the copy is a true copy.
- Details for the certifying authority are included: full name, qualification, registration number (if applicable), date and signature.



*"I certify that this document is a true copy of the original"*

Name: Kate Anderson      Qualification: JP  
Date: 31 July 2015      Registration no: 222222

## Do proof of identity and/or linking documents need to be translated?

If your proof of identity and/or linking documents are in a language that is not understood by the person carrying out the verification, they must be accompanied by an English translation prepared by an accredited translator.

## Who can certify my identification document?

For a full listing of people who can certify your documents, see Part 2 of Schedule 1 of the *Statutory Declarations Regulations 2023*. Some of the people who can certify documents are:

- a medical practitioner
- a nurse
- an optometrist
- a psychologist
- a pharmacist
- a chiropractor
- a veterinary surgeon
- an accountant (member of ATMA, CA ANZ, CPA or IPA)
- a teacher permanently employed on a full time or part time basis at a school or tertiary institution
- a notary public
- a police officer
- a Justice of the Peace
- a magistrate
- a marriage celebrant
- a member of the Governance Institute of Australia Ltd
- a SES employee of the Commonwealth.

## What if I don't certify my identity documents correctly?

If the identification documents you send with your application are not certified or incorrectly certified, we may call you to verify your identity over the phone. If you're unable to give us enough information to identify you over the phone, you may need to resend certified proof of identity documents. This will lead to delays in processing your application.

**Return your completed and signed form to [hesta@hesta.com.au](mailto:hesta@hesta.com.au) or mail to:**

**HESTA, Locked Bag 35007, Collins St West VIC 8007.**

If you have any questions about completing this form, call us on 1800 813 327 between 8.00am and 8.00pm (AET) Monday to Friday.

## contact us

[hesta@hesta.com.au](mailto:hesta@hesta.com.au) | 1800 813 327 | Locked Bag 35007, Collins St West VIC 8007 | [hesta.com.au](https://hesta.com.au)

Issued by H.E.S.T. Australia Ltd ABN 66 006 818 695 AFSL 235249, the Trustee of HESTA ABN 64 971 749 321. This information is of a general nature. It does not take into account your objectives, financial situation or specific needs so you should look at your own financial position and requirements before making a decision. You may wish to consult an adviser when doing this. The target market determination for HESTA products can be found at [hesta.com.au/TMD](https://hesta.com.au/TMD). Before making a decision about HESTA products you should read the relevant Product Disclosure Statement (call 1800 813 327 or visit [hesta.com.au/pds](https://hesta.com.au/pds) for a copy), and consider any relevant risks (visit [hesta.com.au/understandingrisk](https://hesta.com.au/understandingrisk)). Please refer to the Privacy Policy and Privacy Collection Statement at [hesta.com.au/privacy](https://hesta.com.au/privacy) for details about how HESTA collects, uses and discloses personal information.