

Application for Early Release of Superannuation Benefits - Compassionate Grounds

Note: Only Australian or New Zealand citizens or, permanent residents of Australia are permitted to claim for the early release of preserved superannuation benefits on compassionate grounds.

Please email the completed form to: supersimplifier@dash.com.au

The Australian Taxation Office (ATO) is responsible for assessing all requests for early release of benefits on specified compassionate grounds. This form can be used to arrange a payment from your account **after** the ATO has approved the early release of your benefit on these grounds. You can apply to the ATO for access to your super if you need the money to pay for:

- Medical treatment and medical transport for you or your dependent.
- Making a payment on a home loan or council rates so you don't lose your home.
- Modifying your home or vehicle to accommodate your or your dependent's severe disability.
- Palliative care for you or a dependent.
- Expenses associated with the death, funeral or burial of your dependent.

The ATO will assess your application and write to you with their decision. If the ATO approves the early release of your benefit, please send the following documents to Super Simplifier:

1. ATO letter of approval of the early release of your benefit
2. this application form (completed)
3. proof of identity documents (see section 4)
4. Copy of a bank statement displaying the account holder name, BSB and account number

*Documents not written in English must be accompanied by an English translation prepared by an accredited translator.

Checklist

- ☐ ATO letter of approval of the early release of your benefit
- ☐ This application form (completed)
- ☐ Proof of identity documents
- ☐ Copy of a bank statement displaying the account holder name, BSB and account number

Section 1: Personal details

Surname:		Member number:	
Given name(s):		Date of birth:	
Postal address:			
Suburb:		State:	
Contact phone number:		Postcode:	
Email:			

Section 2: Payment details

Please note that a bank document which displays the name of the account holder (or jointly held), BSB and account number needs to be submitted with your form. This document must be on bank letterhead or a bank statement and must be less than 6 months old. Please also complete section 3: Identity verification below.

Please provide your bank account details below:

Account name:

Name of bank or
financial institution:

BSB:

Account Number:

Section 3: Identity verification

To make payments to you from your super account we must verify your identity. You must select one of the identity verification options to use:

- electronically verification process, you submit with this form a scanned non-certified colour copy of your photographic identification and provide consent (see below) for us to electronically verify your identity. When you opt for electronic verification, the details of the documents you provide to us will be submitted to the Australian government's Document Verification Service (DVS). The DVS is a national online system that allows organisations to compare an individual's identifying information with a government record. Information about their privacy policy is available from their website: <http://www.dvs.gov.au>. OR
- you will send us an original certified copy of your photographic identification document via post,

☐

Option 1: I would like to proceed with electronic verification, and consent to the following:

- I consent to having my identity electronically verified; and
- I am authorised to provide the identification documents to you; and
- I understand that the details of the identification documents will be checked against the Australian government's document verification service.

☐

Option 2: I would like to post an original certified copy of my identification document to Super Simplifier.

Please note that we are unable to make any payment until your identity has been verified either by option 1 or option 2 above.

Section 4: Withdrawal details

Please select one of the withdrawal options below:

☐

Total amount approved by the ATO

☐

Nominated amount

\$

Please indicate below if your nominated amount is before tax or after tax

Before tax

☐

After tax

☐

Note: If you currently have insurance cover, you need to ensure there is sufficient money in your account to pay for future insurance premiums to maintain your insurance cover.

Section 5: Declaration

- I declare that the information provided by me in this Early Release of Superannuation Benefits - Compassionate Grounds Application Form is true and correct.
- I declare that I am unable to meet my reasonable and immediate family living expenses and that I do not have any assets (apart from my home) which could (reasonably and realistically speaking) be used or sold to cover this gap.
- I declare that the amount I am requesting to be released is necessary to meet this reasonable and immediate family expense.
- I understand that if I claimed a lesser amount than the ATO approved, no additional payments will be made at a later date.
- I make this declaration by virtue of the Statutory Declaration Act 1959 as amended 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 aspect.

Member signature

Date:

Please email your completed form to supersimplifier@dash.com.au or alternatively, you may post to Super Simplifier Member Administration, PO Box 3528, Tingalpa DC, Qld 4173)

We are committed to respecting the privacy of the personal information you give us.

We have published our Privacy Statement on our website at www.dash.com.au