

ANZ SMART CHOICE SUPER REGULATION 72 NOTICE AND PAYMENT INSTRUCTIONS FORM



24 August 2024

IMPORTANT NOTICE

Pursuant to Regulation 72 of the Family Law (Superannuation) Regulations 2001, the Non-Member Spouse should complete this form in relation to a superannuation interest that is subject to a splitting order or splitting agreement.

STEP 1: YOUR DETAILS (NON-MEMBER SPOUSE)

Title Mr Mrs Ms Miss Dr Other

Surname

Given name(s) (including middle name)

Date of birth

Residential address

Suburb/Town State Postcode

Phone (home) Phone (work)

Mobile

STEP 2: YOUR FORMER SPOUSE

Member number

Surname

Given name(s) (including middle name)

Date of birth

STEP 3: PAYMENT INSTRUCTIONS

Please select one of the following options

Option 1: I am an existing member of the fund

I request the Trustee transfer the benefit to my existing account

Note: funds will be invested in line with your current investment strategy

Account number

Option 2*: Create a new account in ANZ Smart Choice Super

I request the Trustee to create a new account in the Fund for me

Option 3: Rollover/Transfer

I request the Trustee rollover my benefit to the following superannuation fund

Fund name

Australian Business Number (ABN)

Unique Superannuation Identifier (USI)

Account number

*** Note: if you choose option 2**, please ensure you read the ANZ Smart Choice Super and Pension Product Disclosure Statement and apply online at anz.com.au/personal/superannuation/smart-choice-super.

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Option 4: Lump Sum Payment

I request the Trustee to pay my entitlement in a lump sum to me. I am eligible to receive this payment because I meet one of the criteria below:

- I am aged 65 or over
- I have reached preservation age* and have permanently retired and intend never to become engaged in gainful employment for more than 10 hours per week
- I am permanently incapacitated (conditions apply). Please contact us on 1800 515 171 for further information.

* Please refer to the ANZ Smart Choice Super and Pension Additional Information Guide for your preservation age

STEP 4: DECLARATION AND SIGNATURE

The information given on this form is correct and complete.

Important note: The Trustee collects the information on this form for the purpose of administering your family law split benefit and related purposes. For this purpose, the Trustee may disclose your personal information to its related bodies corporate, professional advisers, banks and other financial institutions. If you do not provide all required information, the Trustee may not be able to action your request.

Your personal information will be handled in accordance with the Trustee's privacy policy available at onepathsuperinvest.com.au/about-us/privacy-policy. This policy contains information on how you may access or correct your personal information, any likely overseas disclosure if your personal information and how you may complain about a breach of the Australian Privacy Principles.

You are responsible for advising us if your contact details change. Contact us on **1800 515 171** to ensure we hold your current postal address.

By signing this form I declare that:

- I have fully read this form and the information I have provided is true and correct.
- I discharge OnePath Custodians Pty Limited from any further liability in respect of benefit paid transferred from the Retirement Portfolio Service.
- I request and consent to the payment of benefits as described in this form and authorise OnePath Custodians Pty Limited to determine the tax treatment of the benefit.

Signature of Non-Member Spouse

Date

Please be aware of the identification requirements contained in our ANZ Smart Choice Super and Pension Additional disclosure documents available at anz.com.au/personal/superannuation/smart-choice-super. Any required certified identification must be received before a rollover or lump sum payment can be made. We can use our trusted electronic verification service provider GreenID, which will include the Illion Credit Reporting Agency, to verify your identity. We will contact you to obtain your consent if electronic verification is required. If your identity cannot be verified electronically, then manual document verification may be required.

Please forward all correspondence and enquiries to

Post Family Law Team, GPO Box 5107 Sydney NSW 2001
Email familylaw@insigniafinancial.com.au

Telephone 1800 515 171
Web anz.com.au/smartchoicesuper