



Election to cease membership

Application form and explanatory notes

Only use this form and explanatory notes if you are a contributing member of the PSS (and are not on leave without pay that does not count as service) and wish to cease PSS membership to join an alternative scheme (the PSSap if you are eligible – check with your employer).

Before completing this application form you should read the **PSS Product Disclosure Statement**, **PSS Super Book** and the **Ceasing PSS membership** fact sheet at www.pss.gov.au or call 1300 000 377.

It is important to note that once you have made a valid election to cease your PSS membership, we will preserve your benefit and there is **no option to re-join the scheme at a later date**.

Read this first

These notes are intended to assist you in completing the attached form. They are not intended to provide a detailed explanation about your option to cease PSS membership.

Where to find out more about your option to cease PSS membership

Please refer to our publications outlined on page 1 when you are deciding on your options. There are also fact sheets, calculators and case studies available at www.pss.gov.au

Other sources of information include the following:

Our Contact Centre:

- > Phone: 1300 000 377
- > Email: members@pss.gov.au

It is in your interest to seek professional advice before you make a decision. We cannot provide you with financial advice.

The PSS election to cease membership form

Take care when completing this form. If you do not complete the application form correctly we may declare it void.

Section A – Personal details

Please complete all the boxes in Section A. This enables us to identify you and tell us where to contact you.

Relationship details

Please provide details of your relationship status, including same sex or opposite sex de facto relationships. You may wish to include a copy of your marriage certificate or registered relationship certificate with your application. This would speed up the process in the event that a spouse's benefit becomes payable.

For the definition of a spouse for death benefits, see the **Death benefits** fact sheet at www.pss.gov.au

Contact details

This postal address is where we will send all correspondence to you.

We also require contact phone numbers, in case we need to contact you. Your current work number, an email address, either at work or at home, is useful for us to contact you quickly.

Employment details

Please provide the details of your current employer so we can contact them if required.

Section B – Information acknowledgement

Please complete this to acknowledge that you have received and understood sufficient information to be able to make an informed choice about your election to cease PSS membership.

You are making a formal election under the provision of the *Superannuation Act 1990*. This election is binding and you cannot change it.

We **strongly recommend** you make use of the information sources outlined at the start of the explanatory notes **before** you complete this section.

Section C – Joining an alternative scheme

When you elect to cease PSS membership, one of the following two options will apply to you:

- > If you are eligible to be a member of the PSSap you will automatically join the PSSap
or
- > If you are not eligible to be a member of the PSSap you can elect to join a superannuation fund of your choice provided your employer agrees to make superannuation contributions on your behalf into that superannuation fund.

It is very important that you discuss with your employer your intention to cease PSS membership and the options available to you to join another superannuation scheme. Your PSS membership will not cease until you have become a member of another superannuation scheme. It is not sufficient that you elect to cease PSS membership; you must also become a member of another superannuation scheme for the cessation of your PSS membership to take effect.

You should tick which statement applies to you in this section.

Section D – Transfer amounts currently held by the PSS

If you have a transfer value you can pay the transfer value into an accumulation scheme. There are two types of transfer values:

- > post 1996 transfer values
- > pre 1996 transfer values.

Be aware that if you don't elect to rollover your transfer amount (on this election form) it will be included in the amount left preserved in the PSS and you will not be able to access any part of your benefit until you meet a condition of release.

Section E – Taxation

Start date for taxation purposes

For taxation purposes, your lump sum benefit is called a Superannuation Lump Sum Payment.

The start date relates to the date your eligible service period (ESP) started and is used to calculate the various components of your Superannuation Lump Sum Payment for taxation purposes.

Generally, your ESP is the number of days between the date you started your current employment (which may be earlier than the date you joined the CSS or PSS), and the date your payment is made. If you were formerly a CSS member who started membership before 1 July 1983 and you have a long service leave start date that is earlier than your CSS start date, that earlier date applies as your ESP start date.

Earlier periods of employment for which you paid a transfer value into the CSS or PSS are added to your ESP. If this is the case, please fill in the start date of that earlier service.

If you do not show a date in this section, we will use the date on which you joined the PSS as your start date (unless you transferred from the CSS, in which case we will use your CSS start date). If you are leaving your entire benefit (including any transfer amounts) preserved in the PSS you do not need to fill out this section.

Tax File Number (TFN)

E2 Your Tax File Number

In accordance with the *Taxation Laws Amendment (Tax File Numbers) Act 1988*, we are required to deduct PAYG tax at the top marginal rate plus the Medicare levy from benefits if a person does not provide a TFN.

If you have not been issued a TFN you should lodge an Australian Taxation Office (ATO) Application/Enquiry form with the ATO. Forms are available at www.ato.gov.au or all ATO branches. You must provide proof of identity at the time you lodge the form.

E3 Approval to advise your TFN to rollover funds

We will provide your TFN to the receiving fund unless you instruct us not to. Please note that there are consequences for not supplying your TFN to a fund.

Section F – Departmental report

Cessation date

Your PSS membership will not cease until you have become a member of another superannuation scheme. It is not sufficient that you elect to cease PSS membership; you must also become a member of another superannuation scheme for the cessation of your PSS membership to take effect. Therefore, your cessation date is the day BEFORE the date you join your new fund.

What next?

DO NOT SEND THE COMPLETED APPLICATION FORM DIRECTLY TO US.

When you have completed sections A, B, C, D and E of this form please give the form to your personnel section so they can complete the relevant section. Your personnel section will forward the completed form to us.

Privacy

ARIA and its administrator, ComSuper are collecting the information on this form for the following reasons:

- > to confirm your identity
- > to assess your eligibility for payment of the benefit
- > to pay your benefit
- > to contact you.

ARIA and ComSuper are committed to protecting any personal information we hold about you. Your information will not be used for any other purpose or disclosed to another party unless:

- > you authorise us to do so
- > the disclosure is authorised by law. This may include disclosing your personal information to other government agencies that have specific legislative authority to collect this information as required by policy and legislation. We will not disclose your personal information to the agencies unless it is lawful to do so.

Change of address

We will preserve your benefit in the PSS and it is important that you advise us of any change in your postal address. This will enable us to forward information to you each year regarding your benefit.

Note: if you are a preserved benefit member and don't advise us of your change of address, we may treat you as a 'lost member'. This may ultimately result in your benefit being classed as 'unclaimed' once you reach 65.

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Australian
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Investment
Alliance

Election to cease membership

Application Form

When completing this form, please:

- > Read the explanatory notes and each section of the form carefully before filling it in
- > Use capital letters and a blue or black pen
- > Sign your name where needed. If you don't sign the relevant sections of the form, we will return it to you.

SECTION A - Personal details

Reference (AGS) number

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Cessation date

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Title (please tick one)

Mr
 Ms
 Mrs
 Miss
 Other

YOUR NAME
Surname

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Given name/s

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Your date of birth

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Relationship details

Married
 Single
 De facto

SPOUSE'S FULL NAME
Surname

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Start date of de facto relationship
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Spouse's date of birth

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Previous memberships

Have you had any other periods of PSS membership? If so, please list the reference (AGS) number(s) for each of those memberships.

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YOUR CONTACT DETAILS
Your postal address

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STATE POSTCODE

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Contact phone number
(business hours)

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Mobile phone number

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Section A continued over page

SECTION E - Taxation

E1. What is your start date for taxation purposes?

See **Section E** in the **explanatory notes**

| DAY | | MONTH | | YEAR | |
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E2. Providing your TFN is voluntary. If you choose not to provide it you will not commit an offence. The consequences of not providing your TFN are:

- > tax will be deducted from your benefit/s at the highest marginal rate
- > the trustee of another superannuation scheme or RSA provider holding your benefits now or in the future may not be able to locate, amalgamate or identify your benefits in order to pay you

Note that these consequences may change in the future as a result of legislative change.

The PSS is authorised to collect your TFN under the provisions of the *Superannuation Industry (Supervision) Act 1993*. We will treat your TFN as confidential and will only use it for legal purposes, which include:

- > disclosing it to the trustee of an eligible superannuation entity, regulated exempt public sector superannuation scheme or RSA provider to which your benefits are transferred in the future, unless you specifically instruct us not to
- > finding or identifying your superannuation benefits where other information is insufficient
- > calculating tax on your benefits
- > providing information to the Commissioner for Taxation.

Note that the lawful purposes may change in the future as a result of legislative change.

Important Note: If you have already provided your TFN to us you are under no obligation to provide it again when making an application for benefits. However, if your TFN is NOT recorded by us, payment of your benefits may be delayed.

E3. Select this box if you do not want us to pass on your TFN

What is your Tax File Number?

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We are authorised to collect your Tax File Number (TFN) under the provisions of the *Superannuation Industry (Supervision) Act 1993*. Section E of the explanatory notes summarises the legal uses of your TFN.

Member checklist

Have you:

- read all the explanatory notes, received a benefit estimate, and any other information you require to make an informed choice?
- filled in all the sections applicable to you?
- signed the declaration in Section B?
- signed an election option in Section C?
- completed rollover nomination details at Section D?
- provided an 'ESP start date' (if appropriate) in Section E1?
- provided your TFN in Section E2?
- attached a copy of your marriage certificate or registered relationship certificate?

YOU HAVE NOW COMPLETED THIS FORM.

Return it, with any attachments, to your personnel section or pay office for completion of the Departmental Report and forwarding to us.

DON'T FORGET TO CHECK WITH YOUR PERSONNEL SECTION OR PAY OFFICE TO ENSURE THEY HAVE FOWARDED YOUR BENEFIT APPLICATION TO US.

SECTION F - Departmental report - personnel section or pay office to complete

Member's name

Reference (AGS) number

Date of election to cease PSS membership
 DAY MONTH YEAR
 / /

Date joined new super fund
 DAY MONTH YEAR
 / /

Name of new super fund

Salary for superannuation benefit purposes at date of exit:

Note: This is the member's salary for superannuation benefit purposes as at the date of exit. This can be greater than the salary for superannuation contribution purposes at the last birthday.

SALARY FOR SUPERANNUATION BENEFIT PURPOSES AT 1 JULY 1999

\$

SALARY FOR SUPERANNUATION BENEFIT PURPOSES AT DATE OF EXIT

\$

Last three superannuation variations including the payday that contributions were ceased (usually the payday after the date of exit).

| Payday of adjustment | Old permanent contribution | New permanent contribution | Current adjustment | Plus/minus |
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Personnel checklist

NOTE: Failure to provide the documents outlined in this checklist will result in delays in processing this application. We require the following information:

Yes N/A

- Employee's signature and date of birth confirmed
- Superannuation history card or computer print-out attached
- Is the employee receiving an allowance (or did they receive such an allowance in the past three years) that increases salary for superannuation purposes?
- If YES, is the allowance automatically recognised as salary for superannuation purposes? If the allowance is not automatically recognised as salary for superannuation purposes, please attach form S17A, S17S or S17T.
- Has the member ever worked part-time hours? If YES - please attach details
- Has the employee had any periods of LWOP in the two years prior to date of exit? If YES - attach details of starting and ceasing date(s), and type of leave.

