

Step 2: Provide proof of identity

Please complete (X) one of the options below.

I have previously provided certified proof of identity documents or provided the electronic verification information below to Aware Super and I am not changing my name, date of birth or mobile phone number, providing bank details for the first time or changing a previously nominated bank account.

I will provide proof of identification for electronic verification.

Please provide any TWO of the following:

1. Full name **exactly** as it appears on my Medicare card

My Medicare number is

Valid to (MM-YYYY)

My reference number on this card is

Select your Medicare card colour Green Blue Yellow

2. Full name **exactly** as appears on my driver's licence#

Licence number

Licence card number

State of issue

Expiry date (DD-MM-YYYY)

3. My **Australian** passport number is

Place of birth (as shown on your passport)

Country of birth (not shown on your passport)

Family name at birth (not shown on your passport)

I will provide original, certified proof of identity (POI) documents. For a list of POI documents and certification guidelines, refer to the **Notes** section. If my POI documents have not been certified correctly, I understand Aware Super may use the information on the documents to verify my identity electronically using independent data sources.

* If providing your driver's licence details in this step, your driver's licence number and driver's licence card number must be provided for Aware Super to complete Proof of Identification checks for those Australian States and Territories where the card number is a mandated requirement. Visit aware.com.au/verify for further information on whether your State/Territory has this as a mandated requirement.

i **For Retirement Income account members who received a Retirement Bonus**

If you withdraw 50% or more of your opening balance within 12 months of opening your Retirement Income account, we reserve the right to deduct the Retirement Bonus from your Retirement Income account, excluding any funds withdrawn due to death, permanent incapacity or terminal illness. Withdrawals include lump sum payments, rollovers, regular income payments, and one-off income payments.

Step 3: Once-off income payment amount

\$,

Before tax After tax

This once-off income payment will be made in addition to any existing regular income payments you currently have (If you do not have a nominated payment order we will withdraw your funds based on the proportion of your account invested in each option at the time of the income payment). The amount you nominate must be within the limits applicable to your account. If you do not choose 'Before tax' or 'After tax', the nominated amount will be paid to you before tax and any tax (if applicable) will be deducted from your account. The remaining minimum account balance is the greater of 10% of your account balance and \$6,000.

Step 4: Choose your payment option

- Deposit the funds into the same Australian bank account that I have on record with Aware Super.
- Deposit the funds into the following new account (must be held in your name or jointly in your name):

You must provide proof of identity in Step 2 if you are providing the below bank details for the first time.

Account holder name/s

Branch (BSB) number

Australian bank account number

Name of bank or financial institution

Branch location

Please ensure the bank details provided are accurate and written clearly. We cannot be held liable where incorrect details are provided above. We cannot deposit your withdrawal into business or superannuation fund accounts or credit accounts such as a Visa or Mastercard account.

Step 5: Read our privacy information

The personal information provided on this form is collected and held by Aware Super, in accordance with the Australian Privacy Principles of the *Privacy Act 1988* (Cth), for the purpose of administering accounts, assessing claims and providing services associated with fund membership. For further information about how personal information is handled, please call us on **1300 650 873** or visit **[aware.com.au/privacy](https://www.aware.com.au/privacy)** to view the privacy policy (a hard copy of the policy may also be provided on request). The policy contains information about access to and correction of personal information, how a complaint can be made about a privacy breach and other important information about how personal information is collected, used and disclosed.

Step 6: Declaration

I request and consent to the withdrawal from my account as described above and authorise Aware Super Pty Ltd (as trustee) to give effect to this payment.


By signing this request, I am making the following statements:

- To the best of my knowledge, the information I have provided is true and correct.
- I have read, understood and accept the Aware Super privacy policy.
- I acknowledge that the trustee may deduct tax (where applicable) from any amount I withdraw.
- I understand that the amount withdrawn from each investment option will be calculated using the unit price for that investment option on the day the withdrawal or rollover is processed. I understand that the funds will not be paid before the unit price has been determined.
- I acknowledge that the trustee may require additional proof of identity in certain circumstances under the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*.
- I authorise the use of my personal details, above, for the purpose of electronic data verification. I understand that my information will be used to verify my identity electronically using independent data sources.

Signature*

Date signed* (DD-MM-YYYY)

 Please sign and date form here.

 Post the form to this address.

Step 7: Where to post your completed form

Please post the completed form to:

Aware Super
GPO Box 89
MELBOURNE VIC 3001

In case you need any further assistance, please contact our Member Support Team on **1300 650 873**.

Proof of identity

Have you changed your name?

If you have changed your name we must obtain and verify your previous full name and new full name against **certified copies** of linking documents displaying both names, such as:

- From Birth, Death's and Marriages Registration Office:
 - marriage certificate (ceremonial certificate is not accepted)
 - relationship certificate
 - change of name certificate
 - birth certificate displaying previous names
 - statutory declaration linking both names and clearly outlining the intention

If you have reverted to your maiden name, we will require your marriage certificate, showing your maiden name and your married name.

- Deed poll

Power of attorney

If you are requesting benefits on behalf of the member as the holder of their Power of Attorney, you must provide certified copies of POI documents for yourself and the member.

We may request updated and/or additional certified POI documents at any time if we consider this is necessary for the security of our members' benefits.

Proof of identity

Any change of name, correction to your date of birth, change of bank account, update to your mobile number or providing an overseas address we have recorded for you must be supported by **proof of identity** (POI) documentation.

Providing certified proof of your identity is a three-step process

1 Collect your originals

Collect your proof of identity document(s). We have listed the documents you can use below.

2 Photocopy your originals

3 Have your copies certified

Take your copies and your original documents to a person who can certify documents. A list of authorised certifiers and certification guidelines is included under **Certification of personal documents**.

You can provide:

Either:

A certified copy of one of the following documents:

- A current drivers licence with a photograph, issued in Australia or under the authority of a foreign country.[^]
- An Australian passport (if expiry is less than 2 years old)
- A current Australian state/territory proof of age card containing your photograph
- A current passport, similar travel document or national identity card issued by a foreign government department, the UN or an agency of the UN, containing your photograph and either your signature or a unique identifier[^]

Or:

One certified document from this list:

- A birth certificate issued by a state or territory of Australia, by a foreign government, or by the United Nations or an agency of the United Nations[^]
- A citizenship certificate issued by the Commonwealth or a foreign government[^]
- A current Centrelink pension card that entitles you to receive financial benefits

AND

One certified document from this list:

- A notice issued by the ATO within the last 12 months that shows your name and current residential address and records an amount payable to or by you e.g. your last tax assessment
- A notice issued by a local council or utilities provider in the last three months showing the provision of services to you and your current residential address e.g. rates notice, electricity or water bill
- A notice issued by the Commonwealth or a state or territory government within the last 12 months showing your name and current residential address and the provision of financial benefits to you e.g. Centrelink letter
- If you're under 18, you can provide a student card, or a letter from a school principal. The letter must include the date it was issued (within three months of providing your proof of ID), your name, residential address and the dates you attended the school.

[^] If the document and/or the certification is not written in English, it must be accompanied by an English translation prepared by a translator accredited by the National Accreditation Authority for Translators and Interpreters Ltd (NAATI). If you are unable to provide these documents, please call us to discuss alternatives.

Certification of personal documents

All copied pages of original personal identity documents (including any change of name documents) must be certified as true copies by an authorised person with the appropriate qualifications or registration (see below) who cannot be the owner or addressee of the document. The authorised person must sight the original and the copy to ensure the documents are identical, then certify each page by writing "Certified to be a true copy of the original seen by me", followed by their signature, printed name, address (personal or professional), qualification (e.g. justice of the peace, Australia Post employee), registration number (if applicable) and date. In the case of a multiple page document, the authorised certifier must certify all pages by repeating the above steps on each page and including the numbering of each page (1 of 25).

If you are in Australia

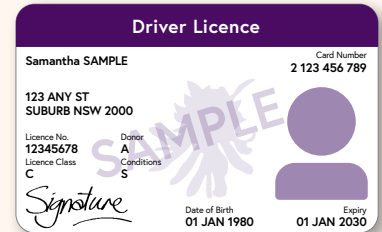
The following lists a subset of people who are authorised to witness your signature on a statutory declaration as well as certify copies of original documents. For a complete list of authorised witnesses/certifiers, go to the Attorney-General's Department website at www.ag.gov.au.

- Australia Post employee in charge of an office providing postal services (charges may apply)
- chiropractor
- dentist
- financial adviser or financial planner
- full-time or part-time teacher employed at a school or tertiary institution
- justice of the peace
- legal practitioner
- magistrate
- medical practitioner
- nurse
- optometrist
- pharmacist
- physiotherapist
- police officer
- psychologist
- veterinary surgeon

Samantha Sample has provided a copy of her identification. It includes her **signature, full name, date of birth and current residential address.**

The authorised person has sighted the original identification and confirmed that the copy is a true copy.

Details for the authorised person to include are full name, address, qualification, registration number (if applicable), date and signature.



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

K Anderson

Name: Kate Anderson

Address: 6 Some St Suburb NSW 2000

Qualification: JP

Registration no: 123456

Date: 1 October 2023

i If you are providing a certified copy of your driver's licence, please ensure this copy contains the card number which may be located on the back of your card.

If you are outside Australia

The following people can certify copies of the originals:

- consular staff at an Australia Embassy, High Commission or Consulate
- a public notary or other person authorised to administer an oath or affirmation or to authenticate documents in the country you are visiting or living in.

The professions listed under **If you are in Australia** can only certify documents outside Australia if they work or are registered in Australia. Where your documents are certified outside Australia, the certifier must quote their registration number or the relevant law that qualifies them to authenticate your documents.

Overseas residents

If you change your address to an overseas address, reside overseas or direct Aware Super to make your payment to an overseas address, you must provide verification proof.

What proof of identity information must be provided?

A passport issued by the Commonwealth,

OR

A passport or a similar document issued for the purpose of international travel, that:

- a. contains a photograph and the signature of the person in whose name the document is issued
- b. is issued by a foreign government, the United Nations or an agency of the United Nations, and
- c. if it is written in a language that is not understood by the person carrying out the verification, is accompanied by an English translation prepared by an accredited translator.

AND

one of the following:

- a. a licence or permit issued under the law or equivalent authority of a foreign country for the purpose of driving a vehicle that contains a photograph of the person in whose name the document is issued and contains their residential address, or
- b. a notice that:
 - was issued to an individual by a local government body or utilities provider within the preceding three months
 - contains the name of the individual and his or her residential address, and
 - records the provision of services by that local government body or utilities provider to that address or to that person.