

## EasyDraw form

### Information sheet

#### When to use this form

Use this form to set up the EasyDraw facility on your SignatureSuper account and request a partial withdrawal or change your nominated bank account details.

Once the EasyDraw facility has been set up, you can request a partial withdrawal:

- via your online My AMP account, or
- by calling us on 131 267.

**Note:** We'll transfer the money directly to your nominated bank account.

#### Who can apply for EasyDraw?

You can only apply for the EasyDraw servicing facility if you meet one of the following conditions of release:

- you're permanently retiring after reaching your preservation age, or
- you cease employment at age 60 or over, or
- you reach age 65.

You can't apply and are not eligible for EasyDraw if you meet an early condition of release including:

- terminal medical condition
- temporary or permanent incapacity

If you're a temporary resident, you can't apply for EasyDraw. As a temporary resident, you can only access your super once you've departed Australia or if you meet one of the above early conditions of release.

#### Important information

- You'll need to provide us with **proof of identity documentation**. We won't be able to process your request unless this documentation is provided. Please refer to sections **additional identification requirements** and **verifying a customer's identity** in this information sheet for further details.
- Only one partial withdrawal may be requested per two business days.
- The maximum daily withdrawal limit is \$20,000.
- The minimum withdrawal amount you can request under the EasyDraw facility is \$500 yearly.

#### Regular withdrawal plan

You can set up an EasyDraw regular withdrawal plan and choose to receive your withdrawals fortnightly, monthly, quarterly, half-yearly or yearly, or you may want to consider a pension.

Speak to your financial adviser to help you choose an option that suits you.

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Issued by N.M. Superannuation Pty Ltd ABN 31 008 428 322 (trustee), which is part of the AMP group (AMP).

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#### When can you withdraw your super?

As your super enjoys tax advantages, there are legislative restrictions on when you can access it (ie withdraw your super as cash).

For access purposes, super consists of three components:

- Unrestricted non-preserved—this amount can be accessed at any time.
- Restricted non-preserved—this amount can generally be accessed when you stop working for your participating employer.
- Preserved—this amount can only be accessed in the circumstances prescribed by superannuation legislation.

#### Making a partial withdrawal

You're able to access certain benefits that are classed as unrestricted non-preserved. These include:

- Unrestricted non-preserved monies, or
- Selected personal contributions made whilst you were working for employers contributing to this super fund and where you have now ceased employment.

#### Collection of Tax File Number (TFN)

We're required to tell you the following details before you provide your TFN for your super products.

Under the *Superannuation Industry (Supervision) Act 1993*, the trustee is authorised to collect, use and disclose your TFN, which will only be used for lawful purposes.

These purposes may change in the future as a result of legislative change. The trustee may disclose your TFN to another super provider when your benefits are being transferred, unless you request in writing that the trustee of your super fund not disclose your TFN to any other provider.

It's not an offence not to quote your TFN. However, giving your TFN to the fund will have the following advantages (which may not otherwise apply):

- The fund will be able to accept all types of contributions to your account(s).
- The tax on contributions to your super account(s) will not increase.
- Other than the tax that may ordinarily apply, no additional tax will be deducted from your super benefits. This affects both contributions to your super and benefit payments when you start drawing down your super benefits.
- It will make it easier to trace different super accounts in your name so that you receive all your super benefits when you retire.

If you don't provide your TFN you may also be subject to additional tax on employer contributions.

These purposes may change in the future as a result of further legislative changes. More information about the use of TFNs for super changes can be obtained from the ATO hotline 131 020.

### Additional identification requirements

We're required to comply with the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*. This means that we may need to obtain additional identification details when you commence a new account or undertake transactions in relation to your account.

Your identification may need to be verified before we can approve of your request. We may decide to delay or refuse any request or transaction, including suspending a withdrawal application, if we are concerned that there may be a breach of our legal obligations.

Please consider your current financial situation and consult your financial adviser before choosing the option best suited to you. You can contact AMP if you don't have a financial adviser.

### Verifying a customer's identity

We need to verify or confirm your identity by checking that certain details you provide in this form match the details that are in certain documents you need to attach to this form.



If you consent to online identification (ID) verification (see **consent to online verification of identification documents** in this form) you'll still need to provide us with **copies** of your ID documents. However, if you **don't** consent to online ID verification, you'll need to mail us **original certified copies** of your documents (don't send the original documents or email scanned copies to us).

If you're sending a copy of your drivers licence, please make sure you include both the front and back of the licence.

If the document isn't written in English, then you must also attach an English translation prepared by an accredited translator.

### Getting your copies certified

A copy of a document must be certified to be a true and correct copy of the original document. Only certain people can certify copies including:

- police officer or sheriff
- justice of the peace or notary public
- legal practitioner, magistrate, judge or registrar/deputy registrar of a court
- pharmacist, physiotherapist or veterinary surgeon
- optometrist, dentist, medical practitioner or nurse
- member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants, or the National Institute of Accountants.

You can see the full list of people who can certify documents or extracts at [amp.com.au/identification](http://amp.com.au/identification).

Example:

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

*John Citizen*

John Citizen, Justice of the Peace

10 Other Street

Suburb NSW 2000

02 9999 9999 30 May 2020

### Documents for an individual

So we can verify the identity of an individual, you need to send us the documents shown under option A or B:

#### Option A

One of these:

- current Australian state or territory driver licence that has your photo
- Australian passport that is current or expired within the last two years
- card issued under a state or territory law to prove your age that has your photo
- current foreign government passport (or similar international travel document) that has your photo and signature
- current foreign driver licence that has your photo
- current national identity card that has your photo.

#### Option B

One of these:

- Australian or foreign birth certificate
- Australian or foreign citizenship certificate
- birth certificate extract
- pension card issued by Department of Human Services
- health card issued by Department of Human Services.

Plus



The documents listed below are only **valid** if they include your full name and residential address.

One of these:

- a document issued by the Commonwealth or a state or territory within the last 12 months that shows financial benefits paid to you
- a document issued by the ATO within the last 12 months that shows money to be paid to you or that you need to pay to them (make sure you cross out your TFN)
- a document issued by a local government body or utility provider within the last three months that shows the services provided to you at your address
- if you're under 18 years old, a notice issued by a school principal within the last three months that shows how long you attended that school.

Please keep this information sheet for your records—don't return it with your completed form(s).

## EasyDraw form

Use this form to set up the EasyDraw facility on your SignatureSuper account and request a partial withdrawal or change your nominated bank account details.

Once the EasyDraw facility has been set up, you can request a partial withdrawal:

- via your online **My AMP** account, or
- by calling us on 131 267.

**Note:** We'll transfer the money directly to your nominated bank account.



### Proof of identity must always be provided with this form.


Your personal details below must match the identification documents that you are providing.

Please print in CAPITAL LETTERS and place a cross  in any applicable boxes.

1. Personal details									
Account number <input type="text"/>									
Title <input type="text"/>	Date of birth <table border="1"> <tr> <td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td> </tr> </table>	D	D	M	M	Y	Y	Y	Y
D	D	M	M	Y	Y	Y	Y		
Surname <input type="text"/>									
Given name(s) <input type="text"/>									
Occupation (or specify if retired) <input type="text"/>									
Industry <input type="text"/>									
Residential address (a PO Box is not acceptable) <input type="text"/> <input type="text"/>									
Suburb <input type="text"/>	State <input type="text"/>								
Postcode <input type="text"/>									
Country <input type="text"/>									
Contact phone number <input type="text"/>	Mobile number <input type="text"/>								
Email address <input type="text"/>									
Country of residence (please specify if not Australia) <input type="checkbox"/> Australia <input type="checkbox"/> Other <input type="text"/>									
Country of citizenship (please specify if not Australia) <input type="checkbox"/> Australia <input type="checkbox"/> Other <input type="text"/>									

1. Personal details continued									
Address for communications									
<input type="checkbox"/> Please cross <input type="checkbox"/> if same as residential address.									
Address <input type="text"/> <input type="text"/>									
Suburb <input type="text"/>	State <input type="text"/>								
Postcode <input type="text"/>									
2. Tax File Number (TFN)									
<input type="checkbox"/> I want to provide my TFN.									
TFN <table border="1"> <tr> <td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td> </tr> </table>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/> I've previously provided my TFN to AMP.									
<input type="checkbox"/> I don't want to provide my TFN.									
3. Bank account details									
Complete this section to transfer your funds directly to your nominated bank account (below) by direct credit electronic funds transfer.									
Account holder name (payable to member only) <input type="text"/>									
Financial institution name <input type="text"/>									
BSB number <table border="1"> <tr> <td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td> </tr> </table>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Account number <input type="text"/>				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>						

#### 4. Employment status

 Your full employment cessation date must be provided below (where relevant).  
We can't process your withdrawal without the date in full (ie the day, month and year).

Please select **one** option that best reflects your current employment and/or age status:

I've reached my preservation age and have retired from the workforce (refer to your **product disclosure statement (PDS)** for preservation age details).

Date ceased employment:

D	D	M	M	Y	Y	Y	Y
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I'm aged 60 to 64 and have ceased employment.

Date ceased employment:


D	D	M	M	Y	Y	Y	Y
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I'm aged 65 or older.

#### 5. Partial withdrawal details

Complete this section to set up a regular withdrawal plan or a one-off partial withdrawal (otherwise go to section 6).

I'd like to set up a regular withdrawal plan

 – The minimum regular withdrawal amount you can withdraw is \$500 yearly.  
– Your regular withdrawal amount will be proportioned across all your investment options.

Regular withdrawal amount:

\$
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Gross or  Net of any taxes or fees that may apply


Frequency:

Fortnightly     Monthly  
 Quarterly     Half-yearly     Yearly

Regular withdrawal plan start date:

D	D	M	M	Y	Y	Y	Y
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I'd like to make a one-off withdrawal

 The **minimum** partial withdrawal amount you can withdraw is \$500 and the **maximum** partial withdrawal amount you can withdraw is \$20,000.

One-off partial withdrawal amount:

\$
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Gross or  Net of any taxes or fees that may apply

How do you want to withdraw from your investment option/s? (Select one only):

- AMP Super cash  
 Proportioned across all your investment options

#### 6. Acknowledgement and declaration

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

I request N.M. Superannuation Proprietary Limited (N.M. Super) to process my EasyDraw application and pay the proceeds in accordance with my instructions on this form.

I acknowledge and declare that:

- I take full responsibility for my EasyDraw application.
- I've read and understood the information provided in this form and I've considered the **PDS** and any professional advice.
- I'm not commonly known by names different to those disclosed in this application form, unless I have disclosed otherwise to N.M. Super.
- Any document or information to be used for the purpose of this application (whether or not provided on or with this application):
  - is complete and correct
  - if it is about another person, is provided with the authority of that person (if required) and may be used for any other products, services or benefits offered or provided to me/us by or through N.M. Super or any other company in the AMP group.

**Note:** If you wish to check any information before signing, you may request a copy of this information from your financial adviser or N.M. Super.

- I acknowledge that it may be a criminal offence to knowingly provide false or misleading information or documents in connection with this application.
- I'm aware that I may ask N.M. Super for all the information that I need to understand my benefit entitlements in my existing AMP account (including information on the fees, insurance cover, investment options and the effect of a withdrawal) and I don't require any further information.
- I've sought advice from my financial adviser or have decided not to seek advice.
- I discharge N.M. Super from all further liability in respect of the benefits paid.
- I'm not a temporary resident under the *Migration Act 1958*.
- If I've met an early condition of release, AMP will cancel my EasyDraw application.
- For unitised investment options, the unit price(s) used to calculate the number of units (to be redeemed from the relevant investment options) will be that/those determined after all relevant information is received by AMP.
- For accounts which have crediting rate investment options, the withdrawal value will be the amount calculated in terms of the policy conditions after all relevant information is received by AMP.

## 6. Acknowledgement and declaration continued


### Consent to online verification of identification documents

As part of your request, we may need to verify your identification documents online.

This may include:

- checking your identity against personal information held by a credit bureau, and
- checking your identification information with the issuer or official record holder of the identification you provide.

I consent (**cross this box**) to my identification documentation being used to carry out the identification checks described above.

 If you're signing this form digitally, please make sure you attach a **certificate of completion**, otherwise, please print this form and sign it using a pen.

Member name

Member signature

Date

D	D	M	M	Y	Y	Y	Y
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## 7. Checklist

Please make sure you've correctly completed this form before returning it to AMP.

**Have you:**

- Read the **information sheet** attached to this form?
- Provided your member details in section **1**?
- Provided your TFN details (where relevant) in section **2**?
- Correctly completed your bank account details in section **3**?
- Correctly completed section **4** regarding your employment status?
- Correctly completed section **5** if you're setting up a regular withdrawal plan or requesting a one-off partial withdrawal?
- Read and signed section **6** acknowledgement and declaration?
- Consented to providing online ID verification in section **6. consent to online verification of identification documents**, (if applicable)?
- Attached the correct proof of identity documents (if applicable) as described in the information sheet?

## Where to send this form

Mail or email this completed form to:

AMP Limited  
PO Box 6346  
WETHERILL PARK NSW 1851  
askamp@amp.com.au

**Any questions?**  
131 267

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