



## Step 4 – Change to Preservation Status To be completed by Transition to Retirement Pensioners only.

Your transition to retirement benefit is subject to tax on the earnings of your investments. When a condition of release has been met, these benefits will move into a tax free environment. Once a Condition of Release mentioned below is advised to the trustee, your benefit will be transferred to the equivalent tax free investment options. If you wish to change your investment options please go to [anzstaffsuper.com](http://anzstaffsuper.com) and complete the Investment switch form. Once in Retirement Phase the balance will be assessed against the Transfer Balance cap. For further information on this cap please refer to [ato.gov.au/super](http://ato.gov.au/super), or speak to your financial adviser.

### Complete this section if your circumstances that affect the Preservation status of your Pension have changed.

The preserved portion of your pension cannot be released to unreserved status until one of the following conditions have been met:

- You are at least 60 years of age and have ceased employment since attaining age 60;
- OR
- You are between 55 and 60 years old, have ceased employment and have permanently retired from the workforce.

Permanently retired is defined as never being gainfully employed again for more than 10 hours per week. Gainful employment means employed or self-employed for gain or reward in any business, trade, profession, calling, occupation or employment. If you are eligible, please complete one of the following declarations and **attach proof of age** to allow your benefit payment to be processed (e.g. certified photocopy of your driver's licence, passport or birth certificate).

(Select an option )

- Yes, I am at least 60 years of age and I have ceased employment since attaining age 60.
- Yes, I am at least 55 years of age, have ceased employment and intend to permanently retire from the workforce.

Once you attain age 65 these investments will automatically transfer to the tax free investments and will count towards your transfer Balance Cap. For further information on this cap please refer to [ato.gov.au/super](http://ato.gov.au/super), or speak to your financial adviser.

## Protecting members' privacy

The Trustee, ANZ Staff Superannuation (Australia) Pty Limited, seeks to take all reasonable steps to protect members' privacy and the confidentiality of members' personal information.

The administrator, Australian Administration Services Pty Limited, collects (on behalf of the Trustee) personal information directly from members and their employers. Sometimes information about you may be collected from other third parties such as a previous superannuation fund, your financial adviser or publicly available sources. We collect, use and disclose personal information about you to provide and manage your account and give you information about your super, or as required by super and tax laws.

If you do not provide the personal information requested or it is incomplete or inaccurate, we may not be able to manage your account properly and processing of transactions to, from or in relation to your account may be delayed.

Members' personal information is kept confidential but may be disclosed by the Trustee or administrator to third parties, such as ANZ Staff Super's actuary, insurer, medical consultants, underwriter, legal adviser and auditor and other external service providers who are contracted to assist with administering members' benefits. It may also be disclosed where expressly authorised or required by law, for example to government agencies such as the Australian Taxation Office and Australian Financial Complaints Authority. Members' personal information may also be disclosed to the Group Superannuation Department of ANZ for the purposes of administering members' benefits or resolving members' enquiries or complaints.

Members' personal information may be disclosed to related entities of the administrator located overseas as part of the day-to-day provision of administration or ancillary services.

The Trustee's Privacy Policy Statement contains more detail about how we deal with your personal information and information about how you can access and seek correction of information we hold about you. It also includes information about how you can lodge a complaint about how we've dealt with your personal information and how that complaint will be handled.

If you have any queries in relation to privacy issues, please contact:

ANZ Staff Super  
Mail: GPO Box 2139  
Melbourne VIC 3001  
Phone: 1800 000 086  
Fax: (02) 9287 0320  
Email: [enquiry@anzstaffsuper.com](mailto:enquiry@anzstaffsuper.com)

The Trustee's Privacy Policy Statement is available on ANZ Staff Super's website [anzstaffsuper.com](http://anzstaffsuper.com) or by calling us on **1800 000 086**. You can also access the administrator's privacy policy on our website.

## Step 5 – Sign the form

I authorise you to make the changes noted on this form in respect to the information provided in Steps 2, 3 and 4.  
I consent to my information being collected, disclosed and used in the manner set out in this form.

Signature

X

Date

□ □ / □ □ / □ □ □ □

**Please return your completed form to: ANZ Staff Super, GPO Box 2139, Melbourne VIC 3001**