



Lump Sum Withdrawal Request Form

The trustees of the superannuation fund request a lump sum withdrawal for the member specified in the details below.

The trustees instruct you to prepare the appropriate documentation for the lump sum withdrawal.

Fund and member details

Superannuation Fund Name

Member Name

Is the Member claiming the tax-free threshold? Yes No N/A (60+ years old)

Lump Sum Withdrawal Details

Lump Sum Withdrawal Date / /

Lump Sum Amount

Does the member have sufficient unrestricted non-preserved benefits for the lump sum withdrawal?

Yes No

Please choose the relevant option and complete any details requested.

Payment Form

Cash

In specie (specify below)

Asset (quantity)	Amount (market value)
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If you need more space, attach a separate lists.

Please note that we will also need signed off market transfer forms or portfolio reports for any in-specie transfers.

Trustee 1:

Signed: Date: / /

Trustee 2:

Signed: Date: / /

Trustee 3:

Signed: Date: / /

Trustee 4:

Signed: Date: / /

Trustee 5:

Signed: Date: / /

Trustee 6:

Signed: Date: / /