



# RSA Payment Request

Bananacoast Community Credit Union Ltd

ABN 50 087 649 750 AFSL No. 241077

## Personal Details

Full Name:		RSA Member Number:	
Employer: <i>If applicable</i>		Date of Birth:	
Address of Employer: <i>If applicable</i>		Date of Leaving Employment: <i>If applicable</i>	

## Contact Details

Address:		Home Phone:	
Work Phone:		Mobile Phone:	
Fax Number:		Email:	

## Reason For Payment Request *(Tick as Applicable)*

Retirement <input type="checkbox"/> <i>Stat dec required if between 55-60yrs and not already supplied</i>	Termination of Employment <input type="checkbox"/>	Rollover <input type="checkbox"/> <i>transfer to another super fund</i>
Death <input type="checkbox"/>	Financial Hardship <input type="checkbox"/>	Compassionate Grounds <input type="checkbox"/>
Spouse Contribution <input type="checkbox"/>	Withdrawal <i>(Over 65 years)</i> <input type="checkbox"/>	Close RSA – exit fund <input type="checkbox"/>
Total & Permanent Disabled <input type="checkbox"/>	<input type="checkbox"/> Declaration of Deductibility completed if tax deduction is required on contributions	

## Withdrawal Payment Instructions By RSA Holder

Yes  N/A

Account Name:		Member/Account no:	
BSB:		Withdrawal Amount:	\$

## Rollover Instructions – Transfer To Another Super Fund

Yes  N/A

New Fund Name:		New Fund SPN no:	
New Fund Address:		New Fund ABN no:	
New Fund Phone no:		New Fund account no:	

RSA MEMBER Signature	DATE SIGNED / /



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or Legal Personal Representative

## Checklist

### Retirement

- RSA Holder needs to meet criteria for preservation age. Refer to "RSA Information Booklet"
- Letter from RSA Holder confirming:
  - a) The RSA Holder meets the preservation age
  - b) The RSA Holder no longer intends working
- Ensure Declaration of Deductibility is completed if member intends to claim a tax deduction for contributions.

### Withdrawal over 65

- Ensure Declaration of Deductibility is completed if member intends to claim a tax deduction for contributions.

### Death

- Copy of death certificate etc to be attached

### Termination of Employment

- Complete details of rollover. Note. Encourage RSA Holder to retain BCCU fund.
- Ensure Declaration of Deductibility is completed if member intends to claim a tax deduction for contributions.

### Total and Permanent Disablement Cover

- Refer to RSA Co-ordinator

### Financial Hardship

- Refer to RSA Co-ordinator

### Compassionate Grounds

- Refer to RSA Co-ordinator

### Spouse Contribution

- Need to be satisfied that the RSA Holder has worked at anytime in his/her life. If so, funds can be released at age 55. If not, funds are to be released at age 65.

### **Branch Use Only:**

Instructions Taken by \_\_\_\_\_ Branch \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

**SEND COMPLETED FORM TO RSA COORDINATOR**