

Pension Rollover Form

Who should use this form?

You should use this form if you are an NTGPASS member in receipt of a standard pension or a pre-retirement pension and want to roll over all or part of your pension account to:

- an NTGPASS retained account; or
- another superannuation fund.

Members who want to withdraw a lump sum should use the *Pension Lump Sum Withdrawal Form*.

How much can I roll over?

You can roll over any amount over the minimum limit of \$5000 (or the outstanding balance if your account is under \$5000).

Roll over to an NTGPASS retained account

The features of an NTGPASS retained account are as follows:

- No account keeping fees are charged.
- You can choose how your account is invested from a range of six investment options.
- You can add rollovers from other superannuation funds and non-concessional contributions to your retained account.
- Non-preserved benefits can be accessed once in a 12-month period.

Investment options

All NTGPASS members have the same six pre-mixed investment options from which to choose.

Each investment option contains a different mix of growth and defensive assets designed to cater for a variety of personal circumstances and attitude to risk.

Growth assets comprise property and shares while defensive assets comprise fixed interest and cash. The growth and defensive asset weighting for each investment option is illustrated in the table below.

Table: Investment Options

| Investment Option | Growth assets (%) | Defensive assets (%) |
|-------------------|-------------------|----------------------|
| Managed Cash | 0 | 100 |
| Conservative | 30 | 70 |
| Cautious | 50 | 50 |
| Growth | 75 | 25 |
| Assertive | 85 | 15 |
| Aggressive | 100 | 0 |

You can select one option for your retained account and one option for all future contributions (a maximum of two investment options). This will supersede any previous investment option instructions you may have provided.

Please refer to the *Member Investment Choice Fact Sheet* for further information about the options.

Roll over to another superannuation fund

You must provide the details of your chosen superannuation fund on the form to enable us to process your request.

Are there any fees or taxes?

There are no fees or taxes charged for rolling your money out of an NTGPASS pension account.

Identification requirements

Under Commonwealth legislation, you are required to show proof of your identity by providing original or certified copies of identity documents that verify your full name, date of birth and current residential address, for example your driver's licence. For a list of other acceptable identity documents, please refer to our fact sheet *Proving Your Identity*.

If you provide certified copies of identity documents, you must also get the authorised certifier to complete the form *Identity Certification* and return it to our office with your application. These forms are available on our website.

More information

We can not provide personal financial advice. If you require assistance in selecting an investment or payment option, you can seek the services of a qualified professional.

We have a range of information and fact sheets available to members. For more information you can contact our office or visit our website.

Disclaimer

The information made available in this form is provided as a guide only and should not be relied upon for making financial commitments.

The Commissioner of Superannuation and the Northern Territory of Australia accept no responsibility for any losses arising from any use or reliance upon the information or conclusions reached using the information.

Pension Rollover Form

| | | |
|---------------------|---------------|--|
| Full Name | | |
| Residential Address | | |
| Postal Address | | |
| Email Address | | |
| Phone | Mobile | |
| Member Number | Date of Birth | |

Rollover amount

From my NTGPASS pension account, please roll over:

Full account balance or Other Amount \$ *Note: You must rollover a minimum of \$5000*

Investment option

Withdraw the amount from my investment options in order of priority (use numbers)

| | | | | | | | | | | | |
|--------------|--------------------------|--------------|--------------------------|----------|--------------------------|--------|--------------------------|-----------|--------------------------|------------|--------------------------|
| Managed Cash | <input type="checkbox"/> | Conservative | <input type="checkbox"/> | Cautious | <input type="checkbox"/> | Growth | <input type="checkbox"/> | Assertive | <input type="checkbox"/> | Aggressive | <input type="checkbox"/> |
|--------------|--------------------------|--------------|--------------------------|----------|--------------------------|--------|--------------------------|-----------|--------------------------|------------|--------------------------|

By not completing this section, you agree to have the amount withdrawn from all options on a pro-rata basis.

Where do you want this roll over amount to go?

Roll over to an NTGPASS retained account (complete both investment option elections below)

Invest my **retained account** in the following investment option:

| | | | | | | | | | | | |
|--------------|--------------------------|--------------|--------------------------|----------|--------------------------|--------|--------------------------|-----------|--------------------------|------------|--------------------------|
| Managed Cash | <input type="checkbox"/> | Conservative | <input type="checkbox"/> | Cautious | <input type="checkbox"/> | Growth | <input type="checkbox"/> | Assertive | <input type="checkbox"/> | Aggressive | <input type="checkbox"/> |
|--------------|--------------------------|--------------|--------------------------|----------|--------------------------|--------|--------------------------|-----------|--------------------------|------------|--------------------------|

Invest my **future** contributions in the following investment option:

| | | | | | | | | | | | |
|--------------|--------------------------|--------------|--------------------------|----------|--------------------------|--------|--------------------------|-----------|--------------------------|------------|--------------------------|
| Managed Cash | <input type="checkbox"/> | Conservative | <input type="checkbox"/> | Cautious | <input type="checkbox"/> | Growth | <input type="checkbox"/> | Assertive | <input type="checkbox"/> | Aggressive | <input type="checkbox"/> |
|--------------|--------------------------|--------------|--------------------------|----------|--------------------------|--------|--------------------------|-----------|--------------------------|------------|--------------------------|

Roll over to another superannuation fund (complete superannuation fund details below)

| | | |
|--------------------------|---|--|
| Superannuation Fund | | |
| Postal Address (of Fund) | | |
| Membership Number | Australian Business Number (ABN) | |
| Phone Number (of Fund) | Superannuation Product Identification Number (SPIN) | |

Privacy statement

The Northern Territory Superannuation Office is a division of Northern Territory Treasury, a Government Agency. The privacy and confidentiality of your personal information is important to the Northern Territory Superannuation Office. We are collecting the information on this form for the purpose of administering your pension account. The information collected will only be used for the purpose for which it was supplied and your information will not be disclosed to any third party unless required by law or authorised by you. To obtain further information about the NT Government privacy policy or the *Information Act*, please visit the Northern Territory Government website at www.nt.gov.au.

Member declaration

I understand

- that the Northern Territory Superannuation Office can provide me with information but can not give me financial advice and that the information provided is a general guide only and does not constitute personal financial advice;
- that the personal details requested on this form will only be used to administer my NTGPASS account; and
- that if I have an existing NTGPASS account I acknowledge that my monies will be consolidated and my elected investment options will apply.

I have provided an original or certified copy of my identity document(s).

MEMBER SIGNATURE _____

DATE _____