



# IRIS Withdrawal form

## Step 1. Complete your personal details

Member Number:

Surname:

Given Name(s):

Daytime Contact Phone No:

## Step 2. Nominate the type of withdrawal

**Partial** Withdrawal (Go to step 3)    **OR**     **Full** Withdrawal (Go to step 4)

## Step 3. Partial withdrawal amount

Nominate the amount \$  you wish to withdraw and specify the investment options from which you would like your withdrawal to be made from.

Investment Option	Amount	OR	%
IRIS Defensive Option			
IRIS Conservative Option			
IRIS Growth Option			
IRIS High Growth Option			
IRIS Cash Option			
IRIS Diversified Fixed Interest Option			
IRIS Property Option			
IRIS Australian Shares Option			
IRIS Sustainable Australian Shares Option			
IRIS International Shares Option			
<b>Total</b>			<b>100%</b>

**Note:** Where you request a partial withdrawal of your Super Income Stream, an amended minimum annual income amount will not be recalculated until 1 July of the next financial year.

*Please turn over to complete form*

#### Step 4. Your payment options

I would like my withdrawal paid to my pre-nominated bank account where my IRIS income payments are made.

**OR**

I would like to transfer my funds to the rollover fund(s) nominated below\*:

Full name of new fund:

Address of new fund:

Suburb:

State:

Postcode:

ABN of new fund:

**Please provide at least one of the following:**

SPIN (Superannuation Product Identification Number) of a new fund:

**OR**

Your membership number in the new fund (if known):

Who the cheque is to be made payable to:

\*A rollover fund can be a superannuation fund or another super income stream. If you have nominated more than one rollover fund, please attach details of each fund to this form and the portion (in percentage) of the payment that should be allocated to each.

#### Step 5. Confirm your instructions

- I declare that I am the IRIS member whose details appear on this form.
- I confirm that the details I have supplied are correct and request the Responsible Entity to process my request in accordance with the provisions of the Trust Deed.

**I hereby consent to the collection, use, storage and disclosure of my personal information as described in these documents. I understand that if I do not provide you with the information requested in this form, you may not be able to accept or carry out my requests or instructions.**

**I/we have read the Privacy Statement contained in the IRIS Product Disclosure Statement and understand the manner in which SMI Ltd proposes to comply with the requirements of the Privacy Act 1988 (Cth). I acknowledge that the Super Member Investments Privacy Policy is also available from the IRIS website at [retirewithiris.com.au](http://retirewithiris.com.au).**

Signature:

Date:

#### Step 6. Send this form to

**IRIS Administration  
Locked Bag 200  
Carlton South VIC 3053**

**Note:** Emailed requests cannot be accepted. Faxed requests for amounts up to \$50,000 will be accepted, and can be faxed to **1300 655 283**, however the original signed form must also be mailed to us. All other requests must be mailed to IRIS Administration. If you have any questions about completing the Withdrawal Form, you can call us on **1300 367 485** between 8:30am and 5:30pm (Eastern Standard Time).