

# IRIS Withdrawal Form

**Note:** Faxed requests for amounts up to \$50,000 will be accepted, however the original signed form must also be mailed to us. All other requests must be mailed to IRIS Administration.

## Step 1 Complete your Personal Details

Member Number:

Surname:

Given Name (s):

Daytime Contact Phone No:

## Step 2 Nominate the Type of Withdrawal

Is this a:

**Partial** Withdrawal?  (Go to Step 3)

or a

**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.

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## 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	<input type="text"/>		
Address of new fund	<input type="text"/>		
	<input type="text"/>		
	Suburb	State	Postcode
Australian Business Number (ABN) of new fund	<input type="text"/>		

Please provide at least one of the following:

SPIN (Superannuation Product Identification Number) of new fund OR Your Membership Number in the new fund (if known)

Cheque 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 have read the privacy information entitled 'Privacy' contained in the current IRIS Product Disclosure Statement relating to the financial product I have acquired, and I am aware that the Super Members Investments Privacy Policy is available from the IRIS website at [retirewithiris.com.au](http://retirewithiris.com.au).

**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.**

Signature:  \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

## Step 6 Send Your Form to:

IRIS Administration  
Locked Bag 200  
Carlton South Vic 3053

**Note:** Emailed request cannot be accepted. 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).

Withdrawing money from IRIS may have tax implications. If a full or partial withdrawal is made, you are required, by law, to be paid at least the minimum amount of income for the portion of that year. It is strongly recommended that you consult your financial planner prior to making any decisions in relation to your IRIS account.

Super Members Investments Limited (SMI), ABN 61 095 974 100, AFSL 231230, RSE L0001151, RSE R1004359 is the Trustee of the IRIS Super Income Stream.

An Industry Fund Financial Planning (IFFP) planner is available by calling 1300 138 848. These '1300' numbers can be called from anywhere within Australia for the cost of a local call (mobile phones incur higher charges). IFFP and SMI, are both owned by Industry Fund Services Pty Ltd (ABN 54 007 016 195, AFSL 232514) and are related entities. For more information on IFFP, please visit [ifpp.com.au](http://ifpp.com.au).