



# Compassionate **FOUNDATIONS** [Guide]



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## Superannuation may become partially accessible before retirement in specific situations on compassionate grounds.

Intrust Super does not subjectively determine what does and does not constitute compassionate grounds.

The Commonwealth Government provides legislated guidelines for determining whether you are able to access your super benefit by these means.

# How to access super on compassionate grounds?

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To claim your benefit on compassionate grounds:

1

**You must apply to the Australian Taxation Office [ATO] for permission to access your Superannuation benefit.**

ATO can approve the early release of your benefits on the following compassionate grounds, which are found in regulation 6.19A of the Superannuation Industry [Supervision] Regulations 1994:

- **medical treatment** – for medical or dental treatment, for yourself or a dependant;
- **medical transport** – for transport to medical or dental treatment, for yourself or a dependant;
- **mortgage assistance** – to prevent your home from being sold by the lender that has the mortgage;
- **modification to your home and/or motor vehicle** – to modify your home or vehicle to accommodate the needs of you or a dependant, in the case of a severe disability;
- **care for terminal medical condition** – for palliative care for a person with a terminal medical condition, whether it is yourself or a dependant; and
- **funeral assistance** – for expenses associated with a dependant's death, funeral or burial.

Each of the above compassionate grounds has their own application form which you are required to complete and submit regarding your situation. You can download the form[s] that match your situation from the ATO's website at [www.ato.gov.au](http://www.ato.gov.au). Alternatively, you can call the ATO on 13 10 20 [from outside Australia, call +61 3 9268 8332] and they can post, fax or email the correct form to you.

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You will also need to provide the supporting documentation requested in each application form and certified identification. This includes a Driver's Licence or Passport AND a Tax Office notice of assessment or rates/electricity/gas notice [less than 3 months old].

2

**If the ATO gives permission, you need to attach the original letter they provide to the completed application form in this guide, to allow Intrust Super to make a payment.**

Post or deliver both the completed application form and the letter to Intrust Super. A faxed or photocopied form and letter cannot be accepted. Without this information your claim cannot be paid.

**Please note** – Any payments from your superannuation account maybe subject to Government taxes and withdrawal fees.

## **Need more information?**

Intrust Super is always at your service. If you have any questions or need any assistance with this guide and / or completing the application or even your super in general, please contact us on **132 467**.

# Application for early release of benefits due to **COMPASSIONATE GROUNDS**

The following information will be used solely for assessing your claim under the regulations. The completed form [or copy] will not be made available to any other person [except under an order of a Court] however it may be disclosed to the administrator or Government agencies in order to release your funds.

For assistance & enquiries: **Ph 132 467**. Please send this completed form to: **Intrust Super, GPO Box 1416, Brisbane QLD 4001**



**Please write in BLOCK letters using a BLUE or BLACK pen. This request will be invalid if it is unsigned or undated.**

## Step 1 – Your personal details

Intrust Super member number  Date of Birth [DDMMYYYY]  Tax File Number\*  Gender [M/F]

Mr/Mrs/Ms/Miss  Surname

Given Names

Telephone (Home)  Mobile

Email

**STREET ADDRESS:**

Street number  Street name

Suburb/town  State  Post code

**POSTAL ADDRESS** (if different from above):

Street number/PO Box  Street name

Suburb/town  State  Post code

Are you an Australian Citizen or an Australian Permanent Resident?

Yes  No

**Please note** – a certified copy of your current identification must be attached to the application e.g. Driver’s Licence or Passport. If these are unavailable, a birth or citizen certificate AND a Tax Office notice of assessment or rates/electricity/gas notice [less than 3 months old] may be provided. If the information requested above is not provided we may not be able to process your claim.

\*If you have supplied your tax file number to Intrust Super previously you don’t have to do so again.

## Step 2 – Payment method

Pay directly into my financial institution account.

Name of financial institution

Mr/Mrs/Ms/Miss  Surname

Given Names

Account name

Branch [BSB] number  Account number

For the security of your benefit please provide a copy of your financial institution account statement with the application which includes your full name, BSB number and account number

**PLEASE PROVIDE A COPY OF YOUR BANK STATEMENT DATED WITHIN THE LAST 12 MONTHS, SO THAT WE CAN VERIFY THE DETAILS YOU HAVE PROVIDED ARE CORRECT.**

### Step 3 – Declaration and authorisation

- I declare I am the person named on this form, or have a power of attorney to act on the named person's behalf.
- I declare that I am an Australian citizen or a permanent resident of Australia.
- I understand that if the requested withdrawal is of my entire account, my membership in Intrust Super will be terminated and any insurance I have through Intrust Super will cease when my account is closed.
- I understand tax may be deducted from the withdrawal.
- I have provided a copy of my financial institution statement that is not older than 3 months.
- I declare the information given on this form is true and correct.

Full name

Signature



Date [DDMMYYYY]

Personal Information Collection Notification Statement: For details about Intrust Super's personal information handling practices including collection, use and disclosure, how you may access and correct your personal information and raise privacy concerns please visit our website at [www.intrust.com.au/files/privacypolicy](http://www.intrust.com.au/files/privacypolicy) or contact us on 132 467 to obtain a copy of our privacy policy.

# Checklist

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Intrust Super wants to make sure your claim is processed as quickly and easily as possible. To help us do this, please take a few moments to review the following checklist – it will help ensure you complete this form correctly, and remind you to attach all necessary documents before sending this form to us.

- I have completed all application form steps.
- I have supplied the original copy of the ATO letter which gives permission for some of my superannuation benefit to be released.
- I have supplied certified copies of current identification by an authorised person.
- I have completed and signed the declaration and authorisation.
- I have provided a copy of a statement from my financial institution, showing the account name, BSB, and account number so Intrust Super can pay my claim.

## **Send your application to:**

Intrust Super  
GPO Box 1416  
Brisbane QLD 4001



**Visit** Level 21, 10 Eagle Street,  
Brisbane QLD 4000

**Mail** GPO Box 1416,  
Brisbane QLD 4001

**Fax** 1800 603 234

**Email** [info@intrust.com.au](mailto:info@intrust.com.au)

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