

Super condition of release

i Use this form to:

Notify us if you have satisfied a condition of release. Your preservation components will then be updated accordingly. We will apply this to all your accounts held on Panorama Super if those accounts include preserved or restricted non-preserved amounts.

You can type directly into the form or print and complete in block letters using a blue or black pen.

Important information

Do not use this form to advise of a condition of release because you:

- Have a terminal medical condition
- Are permanently incapacitated
- Satisfy severe financial hardship conditions
- Satisfy compassionate grounds conditions
- Were a temporary resident and have departed Australia
- Wish to access restricted non-preserved benefits after terminating gainful employment

If you need to access your funds for any of the above reasons, contact Customer Relations on 1300 881 716.

Privacy Statement

All personal information and credit-related information we collect about you is collected, used and disclosed by us in accordance with our Privacy Statement which is available at www.bt.com.au/personal/help/privacy/privacy-statement or by calling us. Our Privacy Statement also provides information about how you can access and correct your personal information, and make a complaint. You do not have to provide us with any personal information or credit information but, if you don't, we may not be able to process your request.

1 Adviser details (if applicable)

Dealer group name

Adviser full name

2 Member details

First name

Last name

Date of birth (dd/mm/yyyy)

Customer number

3 Condition of release

Select the scenario that applies to you:

I am aged 65 or over.

I have reached my preservation age¹, have ceased employment and do not intend to ever work more than 10 hours per week.

I have ceased a gainful employment arrangement on or after reaching age 60.

Date employment was ceased² (dd/mm/yyyy)

Due to my ill health, I am unlikely to engage in gainful employment for which I am reasonably qualified by education, training or experience.³



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Note: ¹To determine your preservation age refer to the Additional Information Booklet.

²Contributions and investment earnings after the date you ceased employment will not be accessible until you meet one of the other criteria or meet the same criterion again.

³The trustee will need you to complete additional documents. Please contact Panorama on 1300 881 716.

4 Declarations & acknowledgements

I declare that all details given on this form are true and correct and that all other details previously given on my account application for Panorama Super (or as subsequently updated and notified to BT Portfolio Services Limited and BT Funds Management Limited (including their authorised agents, referred together as the Providers)) remain true and correct and should be used in respect of my investment in Panorama Super.

If signing under a power of attorney, I verify that at the time of signing, I have not received notice of revocation of that power.

Full name (please print)

Member signature ([Digital signature](#) accepted)

Date (dd/mm/yyyy)

You can submit this form online



Sign in to your account to upload and submit this form

Advisers: Tracking > Service requests > Submit new request > Account maintenance

Investors: Forms & requests > Submit new request > Account maintenance

If you are unable to upload this form, you can submit it by:

email: professional@panorama.com.au



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