NORTH SERVICE CENTRE
1800 667 841

North

# IDPS – Cash withdrawal request

## Instructions

If you do not have a financial adviser, you can use this form to request a cash withdrawal from your IDPS account on North Online to a bank account on your North Online profile.

We suggest that you seek professional advice to help you understand the implications of any withdrawal from your account before submitting a request.

Please read the **Information sheet** to find out more about each section and the implications of this request.

Note: If the withdrawal amount requested can be fulfilled by the available cash in your account or is up to 80% of your account value, you'll generally receive your funds within three to five business days of receipt of your request.

Please print in CAPITAL LETTERS and place a cross ☒ in any applicable boxes.

## 1. Your details

**Client 1 name**

**Client 2 name (if applicable)**

**Account number**

## 2. Withdrawal amount

Please select one option.

☐ Full withdrawal (**note**: this will sell all your investments and close your account)

☐ Partial withdrawal (**note**: you must leave a minimum balance of $2,000 in your account)

$

☐ Gross (before fees and taxes) ☐ Net (after fees and taxes - default)

## 3. Sell instructions (Partial withdrawals only)

To nominate specific investments to sell for this withdrawal, complete the table below. If the table is left blank, your withdrawal will be processed using available cash in your cash account. If there is insufficient cash, investments will be sold in accordance with the automatic sell instructions applicable to your account.

**Note:** If nominated investments, available cash and/or automatic sell instructions are insufficient to fund the withdrawal, we may need to contact you for further instructions and that may delay processing.

| Investment name or APIR/ASX code | Sell amount | Full sell |
|---|---|---|
| | $ | ☐ |
| | $ | ☐ |
| | $ | ☐ |
| | $ | ☐ |
| | $ | ☐ |
| Total | $ | |



**Issue date**: 16 November 2026

## 4. Payment to nominated bank account

To avoid delays, specify a bank account already provided to North. If you specify a new bank account, this will require additional verification and may delay your payment. We can only pay to an Australian bank account.

The bank account holder name must include a name we hold for you on your North account.

**Bank account holder name(s)**

**BSB number** **Account number**

## Proof of identity

We need to verify your identity before processing this withdrawal. You can provide either:

- A copy of your primary photographic identification document, or
- Copies of both:
  - A primary non-photographic identification document, and
  - A secondary identification document.

See the Proof of identity section within the **Information sheet** for more information.

## 5. Authorities and signature

- I/We declare I/we have read and understood all the information provided in the form and the attached information sheet.
- All details entered in this form are true and correct.
- I/We request NMMT Limited to process my/our withdrawal request and pay the proceeds in accordance with my/our instructions on this form.
- I'm/We're aware of the implications this withdrawal has on the value of my/our Guarantee (if applicable).
- I/We acknowledge that any Term Deposit required to fund this withdrawal may be redeemed prior to its maturity.
- I'm/We're aware that any insurance policy linked to this MyNorth account will be cancelled (full withdrawal only).
- I'm/We're aware that the actual withdrawal amount received may differ from the requested amount due to market movement and any outstanding liabilities such as fees.
- I'm/We're aware that if a partial payment would cause the balance to fall below the product minimum of $2,000, the payment made may be less than the amount requested.
- I/We consent to NMMT Limited disclosing my/our personal information to a third-party electronic verification of identity (EVID) service provider for the purposes of assessing whether my/our information matches (in whole or in part) with various approved electronic verification data sources and I/we have read and understood the information provided in the information sheet under proof of identity.
- By signing this form, I/we confirm that
  - I/we have completed all applicable sections including placing a cross ☒ in any applicable boxes.
  - I/we have provided the required identification documents with this request.
  - The form is signed by me/us or my/our authorised signatory.
  - This form is no longer editable as a PDF and I/we have referred to the **Information sheet** for instructions before submitting this request.

**Investor 1 name** **Investor 2 name (if applicable)**

**Investor 1 signature** **Investor 2 signature (if applicable)**

✗ ✗

**Date** **Date**

☐☐/☐☐/☐☐☐☐ (DD/MM/YYYY) ☐☐/☐☐/☐☐☐☐ (DD/MM/YYYY)

## Where to send this form

Send us the completed form through one of these ways:

| Contact us | | |
|---|---|---|
| email | **north@amp.com.au with the subject: Withdrawal request – [Account number]** | |
| web | **Log on via northonline.com.au and upload the form using the Upload forms page via Activities.** | |
| mail | **North Service Centre**<br>**GPO Box 2915**<br>**MELBOURNE VIC 3001** | **Any questions?**<br>**1800 667 841** |

# IDPS – Cash withdrawal request

## Information sheet

### Payment to nominated bank account

To avoid delays, specify a bank account already provided to North.

If you're supplying new banking details, they'll be added to your client profile once we've verified them. A maximum of four bank accounts can be kept on your profile.

### Proof of identity

We're required under the Anti-Money Laundering and Counter-Terrorism Financing Act 2006 (AML/CTF Act) to verify your identity, including at various times while you hold a product or use our services.

The following primary photographic identification documents can be provided:

- current Australian State or Territory drivers licence
- Australian passport that is current or has expired within the preceding two years
- card issued under a State or Territory law for the purpose of proving a person's age
- foreign government issued passport, drivers licence or similar international travel document, or national identity card issued by a foreign government.

Documents written in a language other than English must be accompanied by an English translation prepared by an accredited translator.

Your identity may be verified electronically using an electronic verification of identity (EVID) service provider. This may involve checking your personal information and identification details, including your full name, residential address and date of birth, against approved electronic verification sources, including information held by credit reporting bodies.

The EVID service provider may also use the Document Verification Service (DVS) to check whether details on your identification document match information held by the relevant Commonwealth, State or Territory government agency that issued or holds the record.

We may ask you to provide additional identification information or documents if required. If we're unable to verify your identity, or have concerns about meeting our legal obligations, we may delay or refuse your withdrawal request.

## Other information

### Withdrawal timeframes

If your withdrawal amount can be fulfilled by the available cash in your account or is up to 80% of your account value, you'll generally receive your funds within three to five business days of receipt of your request. This timing is dependent on us receiving all the information required from you to complete the withdrawal.

When your withdrawal is processed, your cash account may become negative while your investments are being sold. For details on what this means, refer to the IDPS Guide on **northonline.com.au**.

If your withdrawal is for over 80% of your account value and we need to sell investments to fulfil the request, we will need to wait for all applicable investments to be sold before completing the request. For equities, settlement of trades occurs two business days after the day a trade takes place. For managed funds, managed portfolios and term deposits, please refer to the relevant fund PDS for more information on redemption timeframes.

### Capital gains tax (CGT) setting

The CGT calculation method selected for your account will be applied for all partial sales from managed portfolios and managed funds. Please update your CGT settings before submitting this withdrawal request if you would like to change this. This CGT calculation setting does not affect any partial sales on listed securities held outside of managed portfolios, which will remain as First-in First-out (FIFO).

### Insurance

If you wish to close an account which has insurance, this will cause your insurance to be cancelled. Please contact your relevant insurance provider to check if you're eligible to continue your insurance after your account is closed.

If you have group insurance with us, you may be eligible for a group insurance continuation option. Please let us know if you wish to apply for this option.

### Additional information

Before you complete this form, you can ask us for information about your benefits to help you understand the impact of making a withdrawal. This may include information about any applicable transfer or exit fees, your insurance cover and the investment options available to you.

If you haven't provided your TFN to us, your withdrawal may attract additional tax.

If you're providing your completed withdrawal request as a digital file, ensure the editable fields in the document can no longer be modified. You can do this by:

- Manual signature: Print the form, sign and either scan the entire form as a PDF or take a clear photo of it.
- Digital signature: Print the form to PDF to generate a new file without editable fields before uploading to your approved digital signature provider. For more information on approved electronic signature providers, log in via **northonline.com.au** and refer to the how-to guide > Training resources under Support.



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## Privacy - use and disclosure

The privacy of your personal information is important to us. We collect and hold personal information about you so we can provide you with financial products and services and assist you with your ongoing financial needs. If we do not collect this information, we may not be able to provide you with these products and services. We may also use your personal information for other purposes, such as enhancing our customer service and product options, and to inform you of opportunities which may be beneficial to you via direct marketing. Please contact us if you don't want to receive this information.

We only share your personal information with other entities in the AMP Group and with third-party service providers that we need to deal with for the purposes listed above. Some third-party service providers may be located or host data outside Australia. Our privacy policy available at **northonline.com.au/privacy** details the countries where our service providers are located or where data may be hosted.

Our privacy policy contains information on how you can request access to or correction of your personal information, or how to complain if you believe we have breached Australian privacy laws.

Should you want further information on how we handle your personal information, contact us at north@amp.com.au or call 1800 667 841.

Please keep this information sheet for your records

Do not return it with your completed form(s).

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