UniSuper

# Change of details form

Please complete this form to change or correct:

- your name and title
- your address and contact details, or
- your date of birth details in UniSuper's records

Please also complete this form to make or change your preferred beneficiary nomination.

If you are changing your **name** or **date of birth** please attach a certified copy of the relevant documentation evidencing the change, for example, marriage certificate, deed poll, birth certificate, passport.

Please refer to the *Completing proof of identity* fact sheet at the back of this form for information on which documents can be accepted and who can certify them.

## Privacy information

UniSuper recognises the importance of protecting your personal information and is committed to complying with its privacy law obligations. To find out more about how UniSuper collects and manages your personal information, please refer to UniSuper's Privacy Policy, which is available from UniSuper's website at www.unisuper.com.au or by calling the UniSuper Helpline on 1800 331 685 between 8.30 am and 5.30 pm (AEST) Monday to Friday.

## SECTION 1 — Existing member details

Please use BLACK or BLUE BALLPOINT PEN and print in CAPITAL LETTERS. Cross where required X

**Complete all questions in this section as per your latest UniSuper Benefit Statement.**

Title: Mr ☐ Mrs ☐ Ms ☐ Dr ☐ Professor ☐

Other

Surname

Given name

Date of birth *(DDMMYYYY)*

D D M M Y Y Y Y

Daytime contact number

( )

UniSuper member number

*(If you are unsure of your member number, refer to your most recent Benefit Statement or call the UniSuper Helpline on 1800 331 685.)*

## SECTION 2 — Updated member details

Only complete the details that are **new** or have **changed**.

Title: Mr ☐ Mrs ☐ Ms ☐ Dr ☐ Professor ☐

Other

Surname

Given name

Date of birth *(DDMMYYYY)*

D D M M Y Y Y Y

Residential address
number and street *(not PO Box)*

Suburb/Town

State Postcode

Country *(if not Australia)*

Postal address
number and street *(or PO Box if applicable)*

Suburb/Town

State Postcode

Country *(if not Australia)*

Contact numbers

Home ( )

Work ( )

Mobile

*form continues* →

## SECTION 2 — *Continued*

Personal email address

@

Work email address

@

Have you provided your tax file number to UniSuper?

No ☐ Please download or order a *Tax file number collection form* from our website at www.unisuper.com.au or request one by calling the UniSuper Helpline on 1800 331 685.

Yes ☐

## SECTION 3 — Preferred beneficiary nomination

A preferred beneficiary nomination allows you to nominate who you would prefer your benefit be paid to in the event of your death. You can nominate one or more of your dependants and/or your legal personal representative. A preferred beneficiary nomination is **not binding** on the Trustee, however it will be taken into account when the Trustee determines who will receive your benefit. Please see your UniSuper product disclosure statement for more information on preferred beneficiary nominations.

Please nominate your preferred beneficiaries.

(The total percentage of benefit nominations must add up to 100%.)

**Beneficiary 1**

Surname

Given names

What is the beneficiary's relationship to you?
(*Select one box only*)

- Spouse ☐
- Child ☐
- Financially dependent ☐
- Interdependency relationship ☐
- Legal personal representative (estate) ☐

What is the percentage you wish to nominate for this beneficiary?

Percentage ___ . ___ %

**Beneficiary 2**

Surname

Given names

## SECTION 3 — *Continued*

What is the beneficiary's relationship to you?
(*Select one box only*)

- Spouse ☐
- Child ☐
- Financially dependent ☐
- Interdependency relationship ☐
- Legal personal representative (estate) ☐

What is the percentage you wish to nominate for this beneficiary?

Percentage ___ . ___ %

*If you wish to nominate more than two beneficiaries, please attach the same details as above on a separate piece of paper, which is signed and dated in the same manner as this form.*

*The total percentage of benefit nominations must add up to exactly 100%.*

*Alternatively, you can log into MemberOnline via our website at www.unisuper.com.au to make or update your preferred beneficiary nomination/s.*

## SECTION 4 — Member declaration and signature

Please read this declaration before you sign and date your form.

I declare that the information I have given on this form is true and correct.

Signature

✗

Date *(DDMMYYYY)*

D D M M Y Y Y Y

## Certified proof of identity

Please include certified copy of proof of identity documentation to change your

- **name, or**
- **date of birth.**

Details about which documents can be accepted can be found in the *Your guide to proof of identity* fact sheet accompanying this form.

## Return your completed and signed form, and certified copies of your proof of identity documents to:

UniSuper
Level 35, 385 Bourke Street
Melbourne VIC 3000

Please note that certified copies of your proof of identity documents must contain an original signature, faxed or emailed copies will not be accepted.

# Your guide to proof of identity

To prove that you are the person to whom the superannuation entitlements belong, you are required by law to provide certified copies of proof of identity documents in certain circumstances, such as when rolling over your super from one super fund to another, withdrawing your benefit, receiving a death benefit and starting a pension.

## Step 1: Acceptable documents

UniSuper will accept either one document from List A below or two documents from List B.

| List A | List B |
|---|---|
| **A certified copy of a:** | **A certified copy of a:** |
| • Current drivers licence or learners permit (or foreign drivers licence containing your photograph)<br>• Australian passport (current or expired for less than two years) or foreign passport<br>• Proof of age card or other photo ID containing your photograph<br>• National identity card issued by a foreign government or the United Nations containing your photograph and signature | • Birth certificate or birth extract<br>• Australian citizenship certificate<br>• Foreign citizenship certificate<br>• A pension card issued by Centrelink or the Department of Human Services (DHS)<br>AND<br>• Tax assessment notice from the Australian Taxation Office (less than 12 months old) containing your name and residential address<br>• Government benefits notice (less than 12 months old) containing your name and residential address<br>• Local government rates notice or utility bill – i.e. electricity or gas (less than three months old) containing your name and residential address<br>• For persons under age 18: a letter issued by a school principal within the preceding three months containing your name, residential address and the period of time you attended the school |

## Step 2: How to certify documents

### What is a certified copy?

A certified copy is a copy of an original identification document, which has been certified and signed by a person who is authorised to certify that it is a true and correct copy of the original.

### How do I obtain a certified copy of a document?

You will need to take your original documents and a clear photocopy of both sides of the original document to a person who is authorised to certify proof of identity documents (see list overleaf).

### How is a document certified?

The authorised person will need to:

1. Sight the original document and the copy to ensure that both documents are identical,
2. Write or stamp 'this is a true and correct copy of the original document I have sighted' or 'certified true copy', and
3. Write on each copied page their:

- name
- signature
- qualification (i.e. Justice of the Peace), and
- date.

**Example:**

I certify that this is a true and correct copy of the original document I have sighted.

Name: Benjamin Smith
Signature: *B Smith*
Qualification: Optometrist
Date: 2 October 2011

### Important information:

- All pages of your proof of identity documents must be certified.
- The certification must be on the copy of the document, not on a separate page attached to the document.
- The certified copies of your proof of identity documents must contain an original signature, faxed or emailed copies will not be accepted.
- If any documents are written in a language other than English, they must be accompanied by an English translation prepared by an accredited translator.

*form continues* →

### What if I recently changed my name or I'm signing on behalf of another member?

Your name must be the same as shown on your proof of identity. If you have changed your name you will need to provide a certified copy of what is called a 'linking document'. A linking document is a document that proves a relationship exists between two (or more) names.

If you are signing on behalf of another UniSuper member, you will also need to provide a linking document.

The linking document you provide must be certified or it can't be accepted.

Examples of linking documents are:

| Purpose | Suitable linking document |
|---|---|
| Change of name | • Marriage certificate<br>• Change of name certificate from the Registry of Births, Deaths and Marriages |
| Signing on behalf of another member | • Power of Attorney<br>• Guardianship or Administration orders |

## Step 3: Find someone to certify your documents

### Who can certify my identification documents?

Only certain people are authorised to certify personal documents. Some of those people are listed below:

- A teacher employed on a full-time basis at a school or tertiary education institution
- a Justice of the Peace
- a police officer
- a permanent employee of Australia Post Office (who has worked for at least two continuous years)
- a barrister or solicitor (who is enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia, as a legal practitioner)
- a finance company officer, (e.g. a bank manager or bank employee who has worked for the company for at least two continuous years)
- an officer with, or Authorised Representative of, an Australian Financial Services Licensee (who has had at least two years continuous service with one or more licensees)
- a notary public officer
- a registrar or deputy registrar of a court
- an Australian consular officer or Australian diplomatic officer
- a judge or magistrate of a court
- a Chief Executive Officer of a Commonwealth Court
- an accountant (who is a member of the Institute of Chartered Accountants or CPA Australia or the National Institute of Accountants, with at least two years of continuous membership)

A full list is available from the UniSuper website.