

Change of details form – pension members



AVOID PROCESSING DELAYS

We make important changes to our forms at times. Check you're using the latest version by comparing the issue date at the bottom of this page with the version at unisuper.com.au/forms.

Updating your details

Save time by changing your details online—log in to your account on our website.

If you'd like to update or correct your **existing member details**, complete PARTS A, B and H.

To change **the financial institution account details** for your income payments, complete the *Change of bank account details—pension members* form, available on our website.

If you're changing your name or date of birth, please attach a certified copy of the relevant documentation, e.g. marriage certificate, deed poll, birth certificate or passport.

You can also update your name or date of birth online by logging into your account.

Refer to the *Your guide to proof of identity* fact sheet accompanying this form for information on which documents we can accept and how to verify your identity.

Flexi Pension and Term Allocated Pension members only

If you'd like to change **the amount** of your income payments, complete PARTS A, C and H.

To change your **drawdown method**, complete PARTS A, D and H.

To change **the frequency** of your income payments, complete PARTS A, E and H.

To make or change your **non-binding beneficiary nomination**, complete PARTS A, F and H.

If you have a Term Allocated Pension and have selected a reversionary beneficiary, you can't make a non-binding beneficiary nomination.

More than one UniSuper account?

Complete a separate *Change of details form – pension members* for each account you have.

Privacy information

We recognise the importance of protecting your personal information and are committed to complying with our privacy law obligations. For more information on how we collect and manage your information, refer to the *Privacy statement* at the end of this form.

Part A – Your existing details

Please use BLACK or BLUE BALLPOINT PEN and print in CAPITAL LETTERS. Cross where required **X**
Complete everything in this section.

UniSuper pension number

If you're unsure, call us on **1800 331 685**.

Title Mr Mrs Ms Dr Professor

Other

Surname

Given name

Date of birth (DDMMYYYY)

What phone number can we call you on if we have a question about this form?

Contact number (during business hours)

[form continues](#)



Part B – Your updated 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)

Daytime contact number
()

Email address (print in CAPITAL LETTERS)

@

Residential address, number and street (not PO Box)

Suburb/Town

State Postcode

Country (if not Australia)

Is your postal address different from your residential address?

- > No.
 > Yes. Provide your postal address below.

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

Suburb/Town

State Postcode

Country (if not Australia)

Part C – Annual income

If you'd like to change your annual income:

- ...> Go to SECTION 1 if you have a Flexi Pension.
- ...> Go to SECTION 2 if you have a Flexi Pension under transition to retirement (TTR) rules.
- ...> Go to SECTION 3 if you have a Term Allocated Pension.

SECTION 1 – Flexi Pension

Your annual income must be at or above the minimum aged-based percentage of your account balance at the start of your Flexi Pension and then on each 1 July thereafter.

Refer to the *Flexi Pension Product Disclosure Statement* for the minimum income you must take annually.

Future income payments will be adjusted accordingly. Payments will be made in line with your current nominated payment frequency. Complete PART E of this form if you'd like to change your income payment frequency.

> A – Minimum annual amount

OR

> B – Specified amount per payment period for the remainder of the financial year (e.g. monthly if you're paid monthly)

Amount \$, , .

SECTION 2 – Flexi Pension under TTR rules

Your annual income must be between the minimum aged-based percentage and a maximum of 10% of your opening account balance at the start of your Flexi Pension - TTR and then on each 1 July thereafter.

Refer to the *Flexi Pension Product Disclosure Statement* available on our website for the minimum income you must take annually.

Future income payments will be adjusted accordingly. Payments will be made in line with your current nominated payment frequency. Complete PART E of this form if you'd like to change your income payment frequency.

➤ A – Minimum annual amount

OR

➤ B – Maximum annual amount

OR

➤ C – Specified amount per payment period for the remainder of the financial year (e.g. monthly if you're paid monthly)

Amount \$, , .

SECTION 3 – Term Allocated Pension

Your annual income must be between the minimum and maximum amounts set by the government.

To calculate your minimum and maximum annual income, refer to the *How to calculate your Term Allocated Pension income* fact sheet, available on our website.

Future income payments will be adjusted accordingly. Payments will be made in line with your current nominated payment frequency. Complete PART E if you'd like to change your income payment frequency.

➤ A – Minimum annual amount

OR

➤ B – Maximum annual amount

OR

➤ C – Specified amount per payment period for the remainder of the financial year (e.g. monthly if you're paid monthly)

Amount \$, , .

Part D – Drawdown method

If you want to choose how your income is drawn from your investment options, select from one of the following methods (*select one only*):

➤ **Pro-rata** – Payments are drawn from the investment options in proportion to the balance in each investment option at the time of withdrawal.

➤ **Your choice** – Payments are drawn from the investment options in an order nominated by you. (Complete the section below.)

➤ **Default order** – Your payments will be drawn from each of your investment options in the default order (this is the order shown in the list of options below).

If you don't make a choice, the default order shown in the list of options below applies.

Drawdown – Your choice

If you've selected 'Your choice', then order the investment options you want your income payments to be paid from (e.g. 1, 2, 3 etc.)

- | | |
|---|---|
| 1. <input type="checkbox"/> ➤ Cash | 10. <input type="checkbox"/> ➤ Sustainable High Growth |
| 2. <input type="checkbox"/> ➤ Australian Bond | 11. <input type="checkbox"/> ➤ Listed Property |
| 3. <input type="checkbox"/> ➤ Conservative | 12. <input type="checkbox"/> ➤ Australian Shares |
| 4. <input type="checkbox"/> ➤ Conservative Balanced | 13. <input type="checkbox"/> ➤ International Shares |
| 5. <input type="checkbox"/> ➤ Diversified Credit Income | 14. <input type="checkbox"/> ➤ Global Environmental Opportunities |
| 6. <input type="checkbox"/> ➤ Balanced | 15. <input type="checkbox"/> ➤ Australian Equity Income |
| 7. <input type="checkbox"/> ➤ Sustainable Balanced | 16. <input type="checkbox"/> ➤ Global Companies in Asia |
| 8. <input type="checkbox"/> ➤ Growth | |
| 9. <input type="checkbox"/> ➤ High Growth | |

If you choose 'Pro-rata' or 'Your choice', once your selections have been exhausted, the default order will apply until you make a new selection.

It's important to review your drawdown order instructions from time to time because as income is drawn down, this will change how your remaining account balance is spread across your chosen investment options and reduce the degree of diversification.

Over time, the allocation of your remaining account balance between options may reflect a strategy which is very different from your original intentions. You should reconsider whether this is appropriate for your financial needs and circumstances.

Part E – Income payment frequency

If you have a **Flexi Pension** or **Term Allocated Pension** and want to change how often you receive your income payments, select **one** option from the choice below for your future payments.

How often do you wish to receive your income payments?
(select **one** only)

- > Fortnightly
- > Monthly
- > Quarterly*
- > Half yearly[^]
- > Annually. Which month would you like to receive your income payment?
- | | |
|-------------------------------------|--------------------------------------|
| <input type="checkbox"/> > January | <input type="checkbox"/> > July |
| <input type="checkbox"/> > February | <input type="checkbox"/> > August |
| <input type="checkbox"/> > March | <input type="checkbox"/> > September |
| <input type="checkbox"/> > April | <input type="checkbox"/> > October |
| <input type="checkbox"/> > May | <input type="checkbox"/> > November |
| <input type="checkbox"/> > June | <input type="checkbox"/> > December |

* Quarterly payments are made in March, June, September and December.

[^] Half-yearly payments are made in June and December.

Part F – Non-binding beneficiary nomination

Complete this section if you're a **Flexi Pension** or **Term Allocated Pension** member and want to make or change your non-binding beneficiary nomination.

If you have a Term Allocated Pension and have selected a reversionary beneficiary, you cannot make a non-binding beneficiary nomination.

A non-binding beneficiary nomination allows you to nominate who you'd prefer your benefit to be paid to if you die. You can nominate one or more of your dependants and/or your legal personal representative. A non-binding 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 the *Flexi Pension Product Disclosure Statement* for more information on non-binding beneficiary nominations.

If you'd like to make a binding death benefit nomination, read the *Binding death benefit nomination fact sheet and form* available from our website or by calling us.

Beneficiary nomination (select one box only):

- > **Make** a new or **update** my existing non-binding beneficiary nomination/s. Complete the fields in this section.
- > **Revoke** my existing non-binding beneficiary nomination/s. Go to Part H.

Part F – Continued

For your nomination to be valid, the total percentage of your nomination 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 benefit you wish to nominate?

 . %

Beneficiary 2

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 benefit you wish to nominate?

 . %

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

Or you can log in to your account on our website to make or update your non-binding beneficiary nomination/s.



CERTIFIED PROOF OF IDENTITY

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.



NEED HELP?

- Email pensionsmailbox@unisuper.com.au
- Call **1800 331 685**.

Part G – Consent to have your identification verified by UniSuper

I consent to my personal details being used to electronically verify my identity if paper copies of my certified documents are incorrectly certified or can't be read.

I understand my details will be verified through the Australian Government's Document Verification Service and subject to an information match request in relation to relevant official record holder information and a corresponding match result and associated data will be processed through third party systems.

Part H – Member declaration and signature

Read this declaration before you sign and date this form.

- I declare that the information I've provided on this form is true and correct.
- I authorise the Trustee to update the details I have provided on this form for my account.
- I consent to my personal information being used in accordance with *UniSuper's Privacy Policy*.

Signature

Date (DDMMYYYY)



RETURN YOUR COMPLETED AND SIGNED FORM, AND CERTIFIED COPIES OF YOUR PROOF OF IDENTITY DOCUMENTS (IF APPLICABLE) TO:

UniSuper
 Level 1, 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.

Privacy statement

We recognise the importance of protecting your personal information and are committed to complying with our privacy law obligations.

We collect your personal information to administer your account, ensure you're eligible for insurance cover, provide you with UniSuper membership benefits, services and products, verify your identity and improve our products and services. You consent to our collecting sensitive information about you, where collecting that information is reasonably necessary for us to perform one or more of our functions or activities. We usually collect personal and sensitive information directly from you, however, it may also be collected from third parties, such as your employer.

We may also collect this information from you because we're required or authorised by or under an Australian law or a court/tribunal order to collect that information.

If you don't provide this information, we may not be able to administer your account, provide you with a product or service or you may be disadvantaged in some other way.

We may disclose your information to any service provider we engage (for example mail-houses, auditors, insurers, actuaries, lawyers and research consultants) to carry out or help us provide your membership benefits, services and products. This includes overseas entities. The countries we may disclose personal information to are Japan, Canada and the United States of America. Where information is transferred overseas, we'll seek to ensure the recipient of the data has security systems to prevent misuse, loss or unauthorised disclosure in line with Australian laws and standards.

Our Privacy Policy contains information about how you can access any personal information we hold, how to correct your information and how to make a complaint about a breach of the Privacy Act. It's available at unisuper.com.au or by calling **1800 331 685**.