Change of details form – pension members

UniSuper

Save time, go online!

If you're a Flexi Pension or Term Allocated Pension member. The quickest way to update your details is to log into your account at **unisuper.com.au**.

Use this form to update your personal details, update a non-binding beneficiary or to make changes to your income payments.

PART B of this form relates to your member details. Any changes you make in this section will be applied to each of your UniSuper accounts.

Any changes you make in the remaining PARTS (C, D, E, F and G) will be applied to the account nominated in PART A only. If you have more than one UniSuper account, you'll have to complete a separate *Change of details form - pension members* for each.

PRIVACY STATEMENT

UniSuper is committed to protecting your personal information in accordance with privacy law obligations. The information that you provide on this form is collected and used in accordance with our Privacy Policy which can be found online at **unisuper.com.au/privacy**. If you have any privacy related questions, please call **1800 331 685**.

PART A YOUR EXISTING MEMBER DETAILS

› Please complete in BLACK or BLUE BALL POINT PEN and print in CAPITAL LETTERS. Cross (X) where required.
Complete everything in this section.

Account number

If you're unsure of your account number, refer to your most recent UniSuper correspondence or call us on **1800 331 685**.

Title ☐ Mr ☐ Mrs ☐ Ms ☐ Dr ☐ Professor ☐ Other

Surname

Given name(s)

This includes your first name and middle name(s).

Date of birth (DD/MM/YYYY)

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

Daytime contact number

Fund: UniSuper ABN 91 385 943 850 Trustee: UniSuper Limited ABN 54 006 027 121 AFSL 492806
Administrator: UniSuper Management Pty Ltd ABN 91 006 961 799 AFSL 235907
Address: Level 1, 385 Bourke Street, Melbourne Vic 3000
Issue date: 15 July 2026

PART B YOUR UPDATED MEMBER DETAILS

Only update the details that are new or have changed.

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

Please note: you can only update your sex at birth with us **once**. You're not required to provide any evidence to make this update.

Title	☐ Mr ☐ Mrs ☐ Ms ☐ Dr ☐ Professor ☐ Other
Surname	
Given name(s)	
	This includes your first name and middle name(s).
Date of birth (DD/MM/YYYY)	Sex at birth* ☐ Male ☐ Female
Daytime contact number	
Email address	
Residential address (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 (PO Box if applicable)	
Suburb/Town	
State	Postcode
Country (if not Australia)	

* We're required to provide Services Australia with details about your income stream, including your sex at birth.

PART C PROOF OF IDENTITY

Please choose **ONE** of the following options.

☐ I will provide certified proof of identity (POI) documents, and also any required certified linking documents. For a list of POI documents and certification guidelines, refer to the *Your guide to proof of identity* fact sheet at the back of this form. If my identification documents have not been certified correctly, I understand UniSuper may use the information on the documents to verify my identity electronically using independent data sources.

☐ I will provide my identification details below for UniSuper to complete electronic verification on my behalf and also any required certified linking documents, as specified in the *Your guide to proof of identity* fact sheet.

Please complete **ANY TWO** of the DRIVER'S LICENCE, MEDICARE or AUSTRALIAN PASSPORT options if you checked the second box above.

OPTION 1: DRIVER'S LICENCE

Full name **exactly** as appears on my driver's licence

Licence number

Driver's licence card number

State of issue

OPTION 2: MEDICARE

Full name **exactly** as it appears on my Medicare card

My Medicare number is

Card expiry date (MM/YYYY)

My reference number on this card is

Select your Medicare card colour ☐ Green ☐ Blue ☐ Yellow

OPTION 3: AUSTRALIAN PASSPORT

Full name **exactly** as appears on my passport

My **Australian** passport number is

PART D INCOME PAYMENT DETAILS

If you have a **Flexi Pension** or **Term Allocated Pension** and want to change your income payment details, complete this section.

Please note, to change the financial institution details for your income payments, complete the *Change of bank account details - pension members* form, available at **unisuper.com.au/forms**.

PAYMENT FREQUENCY

If you 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** box only)

☐ Fortnightly ☐ Monthly ☐ Quarterly[1] ☐ Half-yearly[2]

☐ Annually. Which month would you like to receive your income payment?

☐ January ☐ February ☐ March ☐ April ☐ May ☐ June

☐ July ☐ August ☐ September ☐ October ☐ November ☐ December

[1] Quarterly payments are made in March, June, September and December.
[2] Half-yearly payments are made in June and December.

PAYMENT AMOUNT

I have a:

☐ Retirement Phase or Beneficiary Income Stream (BIS) Flexi Pension[3]

☐ Transition to Retirement (TTR) Flexi Pension[4]

☐ Term Allocated Pension (TAP)[5]

Future income payments will be adjusted accordingly. Complete the PAYMENT FREQUENCY section above if you'd like to change your income payment frequency.

☐ Minimum amount

OR

☐ Maximum amount (TTR and TAP only)

OR

☐ Specific amount per payment (e.g. monthly if you're paid monthly) $

[3] 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.
[4] 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 TTR Flexi Pension and then on each 1 July thereafter. Refer to the *Flexi Pension Product Disclosure Statement* available at **unisuper.com.au/pds**. for the minimum income you must take annually.
[5] 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 at **unisuper.com.au/pds**.

PART E DRAWDOWN METHOD

Flexi Pension and Term Allocated Pension members only to complete.

If you want to choose how your income (and lump sum withdrawals) are 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 payment.
- ☐ **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. Cash
- ☐ 2. Australian Bond
- ☐ 3. Conservative
- ☐ 4. Conservative Balanced
- ☐ 5. Australian Income
- ☐ 6. Balanced
- ☐ 7. Sustainable Balanced
- ☐ 8. Growth
- ☐ 9. High Growth
- ☐ 10. Sustainable High Growth
- ☐ 11. Listed Property
- ☐ 12. Australian Shares
- ☐ 13. International Shares
- ☐ 14. Global Environmental Opportunities
- ☐ 15. Australian Dividend Income
- ☐ 16. Global Companies in Asia

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 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 can't 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.

Refer to your UniSuper product disclosure statement (PDS) or **unisuper.com.au/beneficiaries** for more information.

If you'd like to make, update or revoke a binding death benefit nomination, you can do this through your online account.

Please note: Non-lapsing binding nominations can be completed online, while lapsing binding nominations must be made using the *Binding Death Benefit Nomination* form.

Beneficiary nomination (select one box only):

- ☐ **Make** a new or **update** my existing non-binding beneficiary nomination. Complete the fields in this section.
- ☐ **Revoke** my existing non-binding beneficiary nomination. Go to PART G.

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 percentage benefit you wish to nominate?

%

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

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

Beneficiary 2

Surname

Given names

What is the percentage benefit you wish to nominate?

%

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

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

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.

PART G MEMBER DECLARATION AND SIGNATURE

› Please 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 collected, used and disclosed in accordance with UniSuper's Privacy Statement and Policy.
- I have attached relevant certified proof of identity document(s) and/or I consent to my personal details being used electronically to verify my identity.

Signature

Date

DD *MM* *YYYY*

Return your form

You can return your form and any supporting documents electronically using the *Upload a document* tool at **unisuper.com.au/contact-us**.

Or by post to Level 1, 385 Bourke Street, Melbourne Vic 3000

Note: We can't accept electronic signatures on this form.

Need help?

- Email **pensionsmailbox@unisuper.com.au**
- Call **1800 331 685**.
- Visit **unisuper.com.au/contact-us** for more options – including chat.

UniSuper

Fact sheet

Your guide to proof of identity

We prioritise the security of your super savings. To make withdrawals or other important changes to your account, you'll need to prove your identity. This fact sheet explains how to submit your ID documents, what documents we can accept, and how to properly certify copies.

Verifying your identity online

The quickest way to prove your identity is through your online account by logging into **unisuper.com.au/memberonline**. It should only take a few minutes, and you'll get instant confirmation of your ID check.

To verify your identity through your online account, you must currently reside in Australia and provide one or more of the following valid Australian documents:

- Australian passport
- Australian visa
- Australian citizenship certificate
- Australian birth certificate
- Australian driver's licence
- Medicare card
- Centrelink card.

Please make sure that you've checked your personal details are up to date with relevant government agencies before you begin the process of verifying your identity online. We use government and public databases to securely verify your identity.

If you cannot confirm your identity via your online account, or if the documents you wish to verify aren't listed above, there are alternative methods to submit your proof of identity documents.

Other ways to verify your identity

You can verify your identity by providing us with certified copies of your ID documents. Before doing so, please ensure you've read this fact sheet to understand which documents are acceptable and how to certify them correctly. You'll also find instructions on how to submit your documents to UniSuper toward the end of this fact sheet.

CIRCUMSTANCES WHERE WE CAN VERIFY YOUR IDENTITY

On some forms, you have the option to include your identity details and give us permission to check them electronically, so you don't need to send certified copies of your ID documents.

In some cases, if the ID documents you send with a form aren't properly certified or are difficult to read, we may try to verify them electronically. Generally, if you've signed the form declaration, you've consented to this process. We'll use the documents you provided to verify your identity. If we're unable to confirm your identity, we will let you know.

ID documents we can accept

Generally, we'll accept either one document from List A or two documents from List B.

LIST A

A certified copy of your current:

- Australian driver's licence or permit
- Passport (expired Australian passports are acceptable if they expired within the last two years)
- Indigenous community card with your photograph issued by the Australian government or a local Indigenous community organisation
- A photo identification card issued by the Commonwealth, states or territories of Australia in your name.

LIST B

A certified copy of your:

- Birth certificate or birth extract.
- Australian citizenship certificate.
- Concession card issued by Centrelink that entitles you to financial benefits, Australian Health Care card, or Department of Veterans' Affairs card, etc.

And:

- Letter from Centrelink regarding a Government assistance payment.
- Notice from the Australian Taxation Office (less than 12 months old) that contains your name and residential address e.g. Notice of Assessment.
- Rates notice from local council (less than 12 months old) that contains your name and residential address.
- Electricity, gas or water bill dated within the past three months that contains your name and residential address.

LINKING DOCUMENTS

For certain requests (such as updating your name or signing on a member's behalf), you must provide a certified linking document in addition to the standard ID documents. These documents demonstrate the connection between you and the change being made or the member. The documents may be issued by an official Australian or foreign entity. The requirement for linking documents varies based on the request, for example:

ACTION	SUITABLE LINKING DOCUMENT
Change of name (document must show history of name change)	• Marriage certificate • Divorce certificate • Change of name certificate • Registered relationship certificate • Birth certificate that shows history of name change • Deed Poll
Updating date of birth	• Birth certificate
Signing on behalf of another member	• Power of Attorney • Guardianship papers

Your linking document can be provided by/from another country. However, any foreign-issued documents not in English must first be translated into English.

Please note: The details of authority (e.g. Power of Attorney documentation) will need to be attached and noted on the member's account before any interaction proceeds. Once we have a valid authority in place, you'll still need to ensure you provide your certified Proof of Identity documents in order to provide us with any instructions in relation to the member's account.

Certifying your ID documents

Take your original document(s) along with a clear photocopy of both sides to an authorised person. We provide a list of who's authorised to certify IDs later in this fact sheet.

The authorised person will need to:

1. sight the original document, and the copy, to ensure both documents are identical, and
2. write or stamp 'this is a true and correct copy of the original document I have sighted' or 'certified true copy', followed by their:
   - signature
   - printed name
   - qualification (e.g. Magistrate), and
   - date.

IMPORTANT THINGS TO REMEMBER

When having your ID documents certified, please ensure the following:

- All pages must be certified.
- The copy of the document must be certified directly, not attached on a separate page.
- Documents not written in English must be accompanied by an English translation prepared by an accredited translator. Both the original document and the translation need to be certified.
- Documents need to be certified within the last 12 months to be accepted.
- The documents being certified are acceptable and considered valid, as outlined in the sections above.

WHO CAN CERTIFY

Some of the people authorised to certify identity documents include:

1. A person currently licensed or registered under a state or territory law to practise in one of the following occupations:
   - Architect
   - Chiropractor
   - Dentist
   - Financial adviser or financial planner
   - Legal practitioner
   - Medical practitioner
   - Midwife
   - Nurse
   - Occupational therapist
   - Optometrist
   - Patent or trade marks attorney
   - Pharmacist
   - Physiotherapist
   - Psychologist
   - Veterinary surgeon.
2. Or, individuals from the following list:
   - A teacher employed on a permanent full-time or part-time basis at a school or tertiary education institution
   - An agent of the Australian Postal Corporation who is in charge of, or a permanent employee with two or more years of continuous service at, an office supplying postal services to the public
   - An officer of a bank, building society, credit union or finance company with two or more years of continuous service

- A clerk, master, registrar or deputy registrar of a court
- A Judge or Magistrate
- A Justice of the Peace
- An accountant who is:
  - A Fellow of the National Tax Accountants' Association, or
  - A member of any of the following:
    - Chartered Accountants Australia and New Zealand
    - The Association of Taxation and Management Accountants
    - CPA Australia
    - The Institute of Public Accountants
- A Notary Public
- A Police Officer.

Members living overseas and foreign ID documents

Similarly to the section *ID documents we can accept*, we can accept a certified copy of a driver's licence, passport or similar travel document issued by a foreign government, if it contains your photograph and signature. The document must not have expired.

Any documents not written in English must be accompanied by an English translation prepared by an accredited translator. Both foreign and English translations must be certified.

If you're living overseas, the following people are authorised to certify identification documents:

- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
- An employee of the Commonwealth or the Australian Trade and Investment Commission who is authorised and exercising his or her function in a country or place outside Australia
- A person authorised as a notary public in a foreign country.

Your documents must be certified by a person with an Australian connection. We won't accept certifications by someone licensed or registered to practise outside of Australia, or who holds a position in a foreign country, except for a foreign notary public.

Have you provided your TFN?

If you provide us with your tax file number (TFN), we may be able to process some requests, such as rollovers, without additional proof of identity. However, if your TFN can't be validated or you're transferring to a self-managed super fund or requesting a withdrawal, proof of identity is still required.

Read more about providing your TFN at **unisuper.com.au/tfn**.

Providing your certified ID documents to UniSuper

Once your ID documents have been correctly certified, you can send them to us electronically or by post.

Electronically: Use our *Upload a document* tool available at **unisuper.com.au/contact-us** or via your UniSuper online account.

By post: Send to UniSuper, Level 1, 385 Bourke Street, Melbourne VIC 3000.

Need help?

- Call **1800 331 685**, or
- visit **unisuper.com.au/contact-us** for more options - including chat.

How we protect your privacy

UniSuper is committed to protecting your personal information in accordance with privacy law obligations. The information that you provide to UniSuper is collected and used in accordance with our Privacy Policy, which can be found online at **unisuper.com.au/privacy**. If you have any privacy related questions, please call **1800 331 685**.

This information is of a general nature only and includes general advice. It has been prepared without taking into account your individual objectives, financial situation or needs. Before making any decision in relation to your UniSuper membership, you should consider your personal circumstances, the relevant product disclosure statement for your membership category and whether to consult a licensed financial adviser. This information is current as at August 2025 and is based on our understanding of legislation at that date. Information is subject to change. To the extent that this fact sheet contains information which is inconsistent with the UniSuper Trust Deed and Regulations (together the Trust Deed), the Trust Deed will prevail. Issued by: UniSuper Management Pty Ltd ABN 91 006 961 799, AFSL No. 235907 on behalf of UniSuper Limited the trustee of UniSuper, Level 1, 385 Bourke Street, Melbourne Vic 3000.

Fund: UniSuper, ABN 91 385 943 850 | Trustee: UniSuper Limited, ABN 54 006 027 121 AFSL 492806 | Date: August 2025 UNIS000F80 0825