

Change of details form – pension members



Save time, go online!

The quickest way to update your details is to log in to 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.

HOW TO USE THIS FORM

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

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 for information on which documents we can accept and how to verify your identity.

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.

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 STATEMENT

UniSuper is committed to protecting your personal information and the confidentiality of your information in accordance with privacy law obligations. The information that you provide to UniSuper 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 DETAILS

- ▶ Please complete in BLACK or BLUE BALL POINT PEN and print in CAPITAL LETTERS. Cross (X) where required.
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 (DD/MM/YYYY)

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

Daytime contact number



PART B YOUR UPDATED DETAILS

➤ Only update the details that are new or have changed.

Title	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Ms	<input type="checkbox"/> Dr	<input type="checkbox"/> Professor	<input type="checkbox"/> Other	<input type="text"/>
Surname	<input type="text"/>						
Given name	<input type="text"/>						
Date of birth (DD/MM/YYYY)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			
Daytime contact number	<input type="text"/>						
Email address	<input type="text"/>						
Residential address (not PO Box)	<input type="text"/>						
Suburb/Town	<input type="text"/>						
State	<input type="text"/>					Postcode	<input type="text"/>
Country (if not Australia)	<input type="text"/>						
Is your postal address different from your residential address?	<input type="checkbox"/> No.	<input type="checkbox"/> Yes. Provide your postal address below.					
Postal address (PO Box if applicable)	<input type="text"/>						
Suburb/Town	<input type="text"/>						
State	<input type="text"/>					Postcode	<input type="text"/>
Country (if not Australia)	<input type="text"/>						

PART C ANNUAL INCOME

If you'd like to change your annual income:

- Go to SECTION 1 if you have a Retirement Phase or Beneficiary Income Stream (BIS) Flexi Pension.
- Go to SECTION 2 if you have a Transition to Retirement (TTR) Flexi Pension.
- Go to SECTION 3 if you have a Term Allocated Pension.

SECTION 1 RETIREMENT PHASE & BENEFICIARY INCOME STREAM (BIS) FLEXI PENSIONS

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)

\$

SECTION 2 TTR FLEXI PENSION

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 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)

\$

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)

\$

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 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.)

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

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"/> February | <input type="checkbox"/> March | <input type="checkbox"/> April | <input type="checkbox"/> May | <input type="checkbox"/> June |
| <input type="checkbox"/> July | <input type="checkbox"/> August | <input type="checkbox"/> September | <input type="checkbox"/> October | <input type="checkbox"/> November | <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.

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.

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.

PART G**CONSENT TO HAVE YOUR IDENTIFICATION VERIFIED BY UNISUPER**

I consent to my personal details being used to electronically verify my identity.

I understand my details will be subject to an information match request for relevant record holder information, and that the result will be provided through an external third party system. If your identity can't be electronically verified, we'll require you to send us a certified copy of your identification with your form.

PART H**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 used in accordance with *UniSuper's Privacy Policy*.

Signature

Date

<input type="text"/>	<input type="text"/>	<input type="text"/>
DD	MM	YYYY

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.

Need help?

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