

Change of details form

– pension members



Save time, go online!

If you're a Flexi Pension or Term Allocated Pension member, the quickest way to update your details is through your online account. Log in 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 and F) 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.

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

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

Title

Mr Mrs Ms Dr Professor Other

Surname

Given name

Date of birth (DD/MM/YYYY)

Daytime contact number

Email address



PART B**CONTINUED**

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)

PART C**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](https://www.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* Half-yearly^ Annually. Which month would you like to receive your income payment? January February March April May June July August September October November December

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

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

PAYMENT AMOUNT

I have a:

 Retirement Phase or Beneficiary Income Stream (BIS) Flexi Pension* Transition to Retirement (TTR) Flexi Pension^ Term Allocated Pension (TAP)**

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) \$

* 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.

^ 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.

**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.

► 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.)

- | | | |
|---|--|---|
| <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 Dividend 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. Australian 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**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.

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 F.

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 F**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*.
- 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.

Signature

Date

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

**Return your form and proof of identity
(if applicable):**

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

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**.

Need help?

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