Change your details - Retirement Income and Transition to Retirement Income

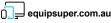


About this form

Use this form to change or update your details on a Retirement Income and Transition to Retirement (TTR) Income account. If you have a super or defined benefit account, please use our Change your details form. It's easy to change your address, contact and income payment details by logging into your account at equipsuper.com.au. Changes to your name, date of birth and bank account details need to be completed on this form and supported with evidence. The documents required are explained on page 2 of this form. In some circumstances, Equip Super may need to request further evidence before proceeding with other change requests.

1 – Your member details		if pell using CAPITAL letter	
Member number			
Title		Sex	Date of birth (ddmmyyyy)
Mr Mrs Ms Miss Other		Male Female	
First name		Last name	
Postal address (must be provided)			
Suburb			
State Postcode Countr	ry (if not Australia)		
Business hours phone	After hours phone		Mobile
Email			









2 - Your updated member details (you only need to update the information below that has changed)

Title Mr Mrs	Ms Miss	Other	Sex her Male Female					Date of birth (ddmmyyyy)															
First name							La	ıst r	nam	e													
Residential addres	s (must be provided)																					
Suburb																							
								ī															
State	Postcode	Country (i	f not Aus	trali	a)																		
Postal address (if different from Residential address)																							
Suburb																							
State	Postcode	Country (i	f not Aus	trali	a)																		
Business hours ph	one		After ho	urs	phor	ie									М	obile	е						
Email																							
I have attach	ed certified proof of i	dentity to s	support a	nv c	hand	e to	m\	/ na	ıme	or o	date	of l	birth	١.									

Change of name and/or date of birth

If you have changed your name, you will need to provide a certified copy of your Marriage Certificate, Deed Poll or Decree Nisi.

If you are changing your date of birth recorded by Equip Super, you will need to provide a certified copy of either your Birth Certificate, Passport or Driver's Licence.

Please note that faxed or scanned copies of certified documents are not acceptable and you should not send your original proof of identity documents to Equip Super.

All copied pages of ORIGINAL proof documents need to be certified by an individual authorised to do so. They must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (eg Justice of the Peace, Australia Post employee etc) and date.

The following are examples of people that can certify copies of the originals as true and correct copies:

- Pharmacist
- · Justice of the Peace
- · Notary Public
- · Medical practitioner or nurse
- · Police officer
- · Accountant (CA/CPA)
- · Legal practitioner
- Financial planner (Officer with or Authorised Representative of an Australian Financial Services Licensee) (with two years' experience)
- Full time teacher (school or tertiary)
- Bank/credit union/building society officer (with two years' experience)
- · Permanent employee of a Commonwealth, State/Territory or local government (with two years' service)







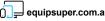


3 - Change your income payments (you only need to update the sections below that you wish to change)

Your existing income payment arrangements will continue for any section that you do not complete or is not completed properly. If the

amount you nominate to be paid in (b) is outside the permitted limits, your income payment amount will be adjusted to the minimum or maximum amount allowed. How often do you want to receive income payments from now on? I don't want to change my income payment frequency Fortnightly Monthly (15th of each month) Income payments will start from the next available payment date after we have set up your account. Half-yearly Quarterly Yearly Please nominate the first month in which your payment cycle is to commence (mmyyyy): (b) How much do you want to receive per income payment? I don't want to change the amount I receive per payment I want to receive the minimum amount I want to receive a nominated amount of \$ per payment I want to receive the maximum amount permitted - for Transition to Retirement Income accounts only where a 10% maximum applies Where would you like your payments to go? I don't want to change my bank account details OR my new bank details are: **BSB** Name of Australian bank, building society or credit union Your account name (must be a personal account held solely or jointly in your name) Account Number Please provide proof of identity documents and a copy of your bank statement showing the account name, BSB and account number. If required, Equip Super may seek further evidence prior to making payments to a new account. Go to equipsuper.com.au/identity to see our proof of identity guide. 4 - Request for a Centrelink Schedule A Centrelink Schedule is a document that is used to inform Centrelink of the various components relating to your superannuation income stream. If you tick this box, we will issue a Centrelink Schedule in accordance with the communication preferences recorded on your income account. Please send me a Centrelink Schedule.









5 - Change your preservation status (Transition to Retirement Income accounts only)

• •	that you've retired. You o	Retirement Income account. Make sure you consider the financial and cannot invest more than the Transfer Balance Cap in your Retirement Income remation if this may apply to you.
I'm 65 or older		
I'm 60 or older and have change	ged jobs or retired since t	urning 60
I have reached my preservation	on age (see table) and ha	e permanently retired from the workforce
Date of birth	Preservation age	
Before 1 July 1962	57	-
1 July 1962 to 30 June 1963	58	
1 July 1963 to 30 June 1964	59	
1 July 1964 or after	60	
online at equipsuper.com.au/priva Togethr Trustee's Privacy Collection	acy or you can obtain a c n Statement details how	ed in accordance with Togethr Trustee's Privacy Statement, which you can view opy by contacting us on 1800 682 626 . we deal with your personal information and who you can talk to if you wish to you. It includes details on how we collect, disclose and manage your personal
		at may receive or provide your information.
Our administrator, Mercer Outsource Privacy Policy online at mercer.cor		lercer), will also handle your personal information. You can view Mercer's
If you have any other queries in relation	on to privacy issues, you o	can contact us or write to our Privacy Officer, GPO Box 4303, Melbourne VIC 3001.
6 – Sign the form		
By signing this form I:		
authorise Equip Super to make the	•	form. dated unless I provide the necessary supporting documentation.
-		5 4 444

Signature	Date (c	ldmmyy	/yy)	
X				

Please return your completed form to Equip Super, GPO Box 4303, Melbourne Vic 3001.



