

Change your pension details



About this form

Use this form to change or update your details on a pension 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 pension payment details by logging into your account at equipsuper.com.au. Changes to your name and date of birth 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 may need to request further evidence before proceeding with other change requests.

1 – Your member details

Please complete in pen using CAPITAL letters

Title	Sex	Date of birth (ddmmyyy)	Member number
Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Other <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Male <input type="checkbox"/> Female <input type="checkbox"/>	<input type="text"/>	<input type="text"/>
First name	Last name		
<input type="text"/>	<input type="text"/>		

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

Title	Sex	Date of birth (ddmmyyy)
Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Other <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Male <input type="checkbox"/> Female <input type="checkbox"/>	<input type="text"/>
First name	Last name	
<input type="text"/>	<input type="text"/>	
Residential address		
<input type="text"/>		
Suburb		
<input type="text"/>		
State	Postcode	Country (if not Australia)
<input type="text"/>	<input type="text"/>	<input type="text"/>
Postal address		
<input type="text"/>		
Suburb		
<input type="text"/>		
State	Postcode	Country (if not Australia)
<input type="text"/>	<input type="text"/>	<input type="text"/>
Business hours phone	After hours phone	Mobile
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email		
<input type="text"/>		

I have attached certified proof of identity to support any change to my name or date of birth.

3 – 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 pension account.

Please send me a Centrelink Schedule.

Need help?

Call us on 1800 682 626 or www.equipsuper.com.au Equip, GPO Box 4303, Melbourne VIC 3001

Issued by Togethr Trustees Pty Ltd ABN 64 006 964 049 AFSL 246383 as trustee for Equipsuper Superannuation Fund ABN 33 813 823 017 USI 33 813 823 017 000

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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, 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.

All copied pages of ORIGINAL proof documents need to be certified by an individual authorised to do so. They must sign 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)

4 – Change your pension payments (you only need to update the sections below that you wish to change)

Your existing pension 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 payment amount will be adjusted to the minimum or maximum amount allowed.

(a) How often do you want to receive payments from now on?

I don't want to change my payment frequency

Fortnightly Monthly (15th of each month) Payments will start from the next available payment date after your request is processed.

Quarterly Half-yearly Yearly Please nominate the first month in which your new payment cycle is to commence:
 (mmyyyy)

(b) How much do you want to receive per payment?

I don't want to change the amount I receive per payment

I want to receive the **temporary reduced** minimum amount for the 2019/20 and 2020/21 financial years - see information on next page

I want to receive the **normal** minimum amount permitted - see information on next page

I want to receive a nominated amount of \$, per payment

I want to receive the maximum amount permitted - for transition to retirement pensions only where a 10% maximum applies

(c) Where would you like your payments to go?

I don't want to change my bank account details

OR my new bank details are:

Name of bank, building society or credit union

BSB

Your account name (must be a personal account held solely or jointly in your name)

Account number

Please provide a copy of your bank statement showing the account name, BSB and account number. If required, Equip may seek further evidence prior to making payments to a new account.

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Minimum annual pension amount

The law requires that you draw a minimum amount from your account based on transition to retirement pension each financial year. The minimum amount is calculated based on your age at 1 July. See the Product Disclosure Statement for more information.

On **23 March 2020**, the Government passed laws allowing members to elect to receive half the normal minimum drawdown required for the 2019/20 and 2020/21 financial years. You can choose this temporary reduced minimum in section 4 (b) of this form. If you elect that option we will assess the payments already paid to you this financial year and if you exceed the reduced minimum, no further payments will be made until your minimum for the 2020/21 financial year is calculated shortly after 30 June 2020.

Your age	Normal minimum amount permitted	Temporary reduced minimum (for 2019/20 and 2020/21)
Under 65	4%	2%
65 to 74	5%	2.5%
75 to 79	6%	3%
80 to 84	7%	3.5%
85 to 89	9%	4.5%
90 to 94	11%	5.5%
95 and over	14%	7%

5 – Change your preservation status (transition to retirement pensions only)

By ticking one of these boxes your account will convert to an account based pension. Make sure you consider the financial and Centrelink implications of declaring that you've retired. You cannot invest more than \$1.6 million into account based pensions, so contact us for more information if this may apply to you.

- I'm 65 or older
- I'm 60 or older and have resigned or retired since turning 60
- I have reached my preservation age (*see table*) and have 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
From 1 July 1964	60

Privacy

The personal information you provide on this form will be used in accordance with Equip's Privacy Statement, which you can view online at www.equipsuper.com.au/privacy or you can obtain a copy by contacting us on 1800 682 626.

We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information about the other products and services offered by us and our related companies. If you do not wish to receive marketing material, please contact us on 1800 682 626. You can also manage your communication preferences via Equip's secure website or by following any instructions in the emails we may send you.

Equip's Privacy Statement details how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It includes details on how we collect, disclose and manage your personal information, including other entities and offshore locations that may receive or provide your information. Our administrator, Mercer Outsourcing (Australia) Pty Ltd, will also handle your personal information. You can view Mercer's Privacy Policy online at www.mercer.com.au/privacy.html.

If you have any other queries in relation to privacy issues, you 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 to make the changes noted on this form.
- understand that some of my personal details cannot be updated unless I provide the necessary supporting documentation.

Signature

Date (ddmmyyyy)

Please return your completed form to Equip, GPO Box 4303, Melbourne VIC 3001

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