

Club Plus Pension Change of Details Form



Please complete this form in black ink using BLOCK letters.

Please return this completed form to: Club Plus Administration, Locked Bag 5042 Parramatta NSW 2124.

Section 1: Your Personal Details

Club Plus Pension Number	Date of Birth (DD/MM/YYYY)	Sex
<input type="text"/>	<input type="text"/>	<input type="text"/>
Mr/Mrs/Ms/Miss	Surname	
<input type="text"/>	<input type="text"/>	<input type="text"/>
Given Names		
<input type="text"/>		
Street Number / PO Box	Street Name	
<input type="text"/>	<input type="text"/>	
Suburb / Town	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Telephone	Mobile	
<input type="text"/>	<input type="text"/>	
Email		
<input type="text"/>		

Section 2: Your Tax File Number (if you wish to advise or change your Tax File Number)

Tax File Number	<input type="checkbox"/> I declare that I have read the tax file number declaration on page 36, and material on page 20 of the PDS and agree to provide my Tax File Number. (Please tick box)
<input type="text"/>	

Section 3: Frequency and Amount of Pension (if you wish to change the amount of pension you are receiving)

Please read the section titled "Pension Payment" – minimum and maximum allowable payments on page 17 of the Product Disclosure Statement prior to completing this section. If your change is received by Club Plus before the 10th day of the month, the new amount and payment frequency will be paid in the current month (or next relevant period). If your request is received after the 10th of the month it will be paid in the following month (or next relevant period).

Please tick the box corresponding to the pension payment frequency you require and nominate the payment amount per period:

If you would prefer not to nominate an amount you may nominate: 1) a "Minimum", which will be the age-based legislated percentage of your account balance, or 2) for Transition to Retirement pensions only, the legislated "Maximum" percentage of your account balance per year.

<input type="checkbox"/> Twice Monthly	<input type="checkbox"/> Monthly	<input type="checkbox"/> Quarterly	<input type="checkbox"/> Half-yearly	<input type="checkbox"/> Yearly
Payment will be made on the 5th and 20th of each month	Payment will be made on the 20th of each month	Payment will be made on the 20th of March, June, September and December	Payment will be made on the 20th of June and December	Payment will be made on the 20th of June
\$ <input type="text"/> <input type="checkbox"/> Minimum Amount <input type="checkbox"/> Maximum Amount (Transition to Retirement pension only)				

Section 4: Payment Instructions (if you wish to change where your pension is paid)

Please provide the details of the bank, building society or credit union account that you wish your pension to be paid to.

Account Name	
<input type="text"/>	
Bank / Building Society / Credit Union Name	
<input type="text"/>	
BSB Number	Account Number
<input type="text"/>	<input type="text"/>

please go to next page to provide more details and sign the form

Section 5: Beneficiary Details (if you want to nominate or change your preferred beneficiary)

You can nominate beneficiaries that you wish to be considered for payment of your entitlements in the event of your death.

Name of Beneficiary

Relationship (e.g. Wife, Son)

Portion of Benefit

 %

Name of Beneficiary

Relationship

Portion of Benefit

 %

Name of Beneficiary

Relationship

Portion of Benefit

 %

Must be **whole numbers** and add to: 100 %

Section 6: Investment Choice (If you want to change your investment options).

You may nominate to invest your pension balance in one of five investment options, or in a combination of the investment options. Please read the section of the PDS titled "Investing Your Funds" on page 8 prior to making a choice:

I would like to change the balance of my Club Plus Pension account to be invested in the following investment options:

Cash

 %

Conservative

 %

Balanced

 %

Growth

 %

Australian Shares

 %

Total

 %

Please note: 1) The minimum investment in any one option is 10%, 2) The amounts must be whole percentages, e.g. 27%, 14% etc.

TOTAL must equal 100%

Section 7: Withdrawal Choice

Please nominate the investment options from which your regular pension payments will be withdrawn.

 %

 %

 %

 %

 %

 %

Please note: 1) The minimum investment in any one option is 10%, 2) The amounts must be whole percentages, e.g. 27%, 14% etc. If you do not wish to make a choice your pension payments will be withdrawn in the same proportions as your nominated investment choices in Section 6.

TOTAL must equal 100%

Section 8: Applicant's Declaration

I hereby declare that:

- The information provided on this application form is true and correct.
- I understand that the Club Plus Pension will operate in accordance with the rules contained in the Club Plus Superannuation Trust Deed dated 27 February 1987, as amended from time to time, and the relevant Commonwealth Government Laws pertaining to superannuation and taxation. I agree to be bound by the provisions of the Club Plus Superannuation Trust Deed.
- I understand that Club Plus Pension may deduct taxation from regular pension payments and any lump sum payments in accordance with Commonwealth Government taxation laws, and based on the information that I have provided.
- I understand that if this form is not received by Club Plus by the following dates, the change will not take effect in the current month:
 - Changes to pension amount or bank account details must be received by the 10th day of the month otherwise the change will take effect next month.
 - Changes of Investment Option must be received by the 20th day of the month to take effect from the first day of the next month, otherwise the change will take effect from the first day of the following month – refer to page 13 of the Pension PDS for more details.
- I agree that neither I nor any other person claiming through me has any claim against Club Plus Superannuation Pty Limited in relation to a payment made or action taken by Club Plus Superannuation Pty Limited if the payment or instruction is made in accordance with the relevant conditions and includes instructions that are later shown to have been made by me.
- I acknowledge that Club Plus has advised me to seek financial advice
- I acknowledge and agree that Club Plus Superannuation Pty Limited has not expressed any opinion as to the appropriateness of any particular investment in the circumstances of any particular member.

Signature

Date (DD/MM/YYYY)