

Pension change of details



Do you know you can make some account changes online?

It's as easy as logging in to your account via *MemberAccess* at clubplussuper.com.au. You can advise a new address, email or phone number, change the frequency or amount of your pension or change your investment option.

When to use this form



Please complete this form if you wish to:

- make changes to your Pension or Transition to Retirement (TTR) Pension account.

References on this form to 'the PDS' are the *Pension division PDS* if you have a Pension and *Transition to Retirement Pension PDS* if you have a TTR pension.

If you also have a CPS super account, you will need to advise any updates to personal details through your *MemberAccess* login for that account or by completing a *Change to Membership details form*.

Please complete this form in black ink using BLOCK letters. This request will be invalid if not signed and dated. Return your signed and completed form to: **Club Plus Pension, Locked Bag 5042, Parramatta NSW 2124**

Section 1: Personal details

Club Plus Pension number:

Title: Mr/Mrs/Ms/Miss/Other

Gender:

Male

Female

Surname:

Given name(s):

Address:

Suburb

State

Phone number:

Mobile number:

Email:

Date of birth (DD/MM/YYYY):

Section 2: Frequency and amount of pension (if you wish to change the amount of pension you are receiving)

Please read section 2 of the PDS prior to completing this section. Your request must be received by Club Plus Super at least 10 days prior to payment date for the new amount and payment frequency to be effective for that next payment. If your request is received within the 10 days prior to a payment date, it may not be updated until the following payment period.

1. Please tick the box corresponding to the pension payment frequency you require.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Twice-monthly	Monthly	Quarterly	Half-yearly	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 June and December	Payment will be made on the 20th of June

2. Please nominate either:

- the gross payment amount per period; or
- the 'minimum', which will be the age-based legislated percentage of your account balance; or
- for Transition to Retirement pensions only, the legislated 'maximum' percentage of your account balance per year.


\$ or Minimum amount or Maximum amount (Transition to Retirement pension only)



If you are under age 60 and would like to make changes to the taxation of your pension (eg to claim the tax-free threshold), you will need to complete and return a new Tax File Number Declaration form which is available by calling our Pension Hotline on **1800 204 194**.

Pension change of details (cont.)

Section 3: Payment Instructions (if you wish to change where your pension is paid)

 Note that any change to bank details must be received at least 10 days prior to your next payment date or they may not be updated until the following payment date.

Account name:

Bank / Building Society / Credit Union name:

BSB number:

Account number:

Section 4: Reversionary Beneficiary details (if you want to nominate, remove or change your reversionary beneficiary)

You can nominate, remove or change your reversionary beneficiary at any time. Please refer to the PDS for information about reversionary beneficiaries.

If you wish to make a nomination that is binding on the Trustee, please complete the *Binding Death Nomination Form* available at clubplussuper.com.au/tools-forms.

Reversionary name

Reversionary's date of birth (DD/MM/YYYY)

Relationship

Address

Suburb/Town

State

Postcode

Please remove the existing reversionary beneficiary nomination from my account.

Section 5: Change TTR to Pension

I declare I am eligible to have my TTR pension converted to an unrestricted pension as:

I have attained age 65

Date (DD/MM/YY):

I retired permanently from the workforce on

- Notes:**
1. If your account is invested in International Shares, you will need to advise a new investment option for this portion of your balance (see section 6 below).
 2. If you are under age 60 and would like to make changes to the taxation of your pension (eg to claim the tax-free threshold), you will need to complete a new Tax File Number Declaration form and return it to us.

Pension change of details (cont.)

Section 6: Investment options

Investment choice

(If you want to change where your funds are invested)

You may nominate to invest your pension balance in one or more of the investment options. Please read the PDS before making a choice.

I would like to change the balance of my Club Plus Super Pension account to be invested in the following investment options (amounts must be in whole percentages eg 27%, 15% etc):

Cash	<input type="text"/>	%
Conservative Balanced	<input type="text"/>	%
Balanced	<input type="text"/>	%
Growth	<input type="text"/>	%
Australian Shares	<input type="text"/>	%
International Shares*	<input type="text"/>	%
Total	<input type="text" value="100"/>	100 %

*International Shares only available for TTR pensions

Withdrawal choice

(If you want to change where your payments are made from)

If you are invested in more than one investment option, please nominate the investment option(s) from which you would like any payments to be withdrawn. Only options you have your account balance invested in can be chosen here and amounts must be in whole percentages (eg 27%, 15% etc)

Cash	<input type="text"/>	%
Conservative Balanced	<input type="text"/>	%
Balanced	<input type="text"/>	%
Growth	<input type="text"/>	%
Australian Shares	<input type="text"/>	%
International Shares*	<input type="text"/>	%
Total	<input type="text" value="100"/>	100 %

*International Shares only available for TTR pensions

Section 7: Privacy

The personal information provided on this form is collected by and held for Club Plus Super by the fund administrator Australian Administration Services (AAS) in accordance with the Australian Privacy Principles of the Privacy Act 1988 (Cth), for the purpose of administering accounts and providing services associated with your membership of the Fund.

You should read the *Privacy Policy* at clubplussuper.com.au before completing the form. Call us on **1800 680 627** for a hard copy of the Policy. The Policy contains information about how personal information is collected, used and disclosed, how you can correct your personal information, make a complaint about a privacy breach and other important information about safeguards in place to protect your personal information.

By providing your information, you acknowledge that you have read and understood the *Privacy Policy*.

Section 8: Declaration

I hereby declare that:

- The information provided on this application form is true and correct.
- I understand that if this form is not received by Club Plus Super by the following dates, the change will not take effect in the current period:
 - Changes to pension amount or bank account details must be received at least 10 days prior to the next payment date.
 - Changes to investment options must be received and processed by 4:00pm (AEST) on any business day to take effect two business days after receipt.
- I acknowledge that Club Plus Super recommend that I consider obtaining advice from a professional and independent financial adviser before making changes to my pension.

Member's signature

Date (DD/MM/YY)

Contact us

pension hotline: 1800 204 194
email: member@clubplussuper.com.au
website: clubplussuper.com.au

Club Plus Superannuation Pty Limited ABN 26 003 217 990, AFSL No. 245362
RSE Licence No. L0000529 as trustee of Club Plus Superannuation Scheme
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