

# Pension application

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

## Section 1: Personal details

Club Plus Super member number

Date of birth (DD/MM/YYYY)

Gender

 Male  Female

Title: Mr/Mrs/Ms/Miss/Other

Surname

Please provide proof of birth date. See the PDS.

Given name(s)

Address

Suburb/Town

State

Postcode

Phone number

Mobile number

Email

## Section 2: Your pension (please tick the box that describes your circumstances)

- 1  I am over 55 and under age 60 and certify that I have retired permanently from the workforce on **Date (DD/MM/YY)**
- 2  I am over age 60 and under age 65 and have ceased employment with the employer who was making payments to Club Plus Super on my behalf as of **Date (DD/MM/YY)**
- 3  I am over age 65
- 4  I do not meet the criteria in 1,2 or 3 and am age 55 or more and applying for a Transition to Retirement Pension (refer to the PDS)

## Section 3: Amount to be transferred to Club Plus Pension

Do you want to invest your whole Club Plus Super account balance or part of your account balance in the Club Plus Pension?

Whole amount - close my Club Plus Super account.  An amount of \$

I approve my Direct Investment Option assets to be sold down to facilitate the full transfer of my Club Plus Super account to pension account.

The maximum amount while keeping my Club Plus Super account open with a minimum balance of \$1,200.

**Please note:** If you have money from another superannuation fund that you want to include in your Club Plus Pension, that amount must be transferred to Club Plus Super prior to commencing your pension.

## Section 4: Investment Choice

Before making a choice, please read the information in the 'shaded' area on page 7.

You may nominate to invest your pension balance in one of six investment options, or in a combination of the investment options. I would like the balance of my Club Plus Pension account to be invested in the following investment options:

Cash	Conservative Balanced	Balanced	Growth	Australian Shares	International Shares	TOTAL
<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %

Total must equal 100%

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## Section 5: Withdrawal choice

Before making a choice, please read the information in the 'shaded' area on page 7.

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

Cash	Conservative	Balanced	Growth	Australian Shares	International Shares	TOTAL
<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %

Total must equal 100%

**Please note:** If you are an existing member and do not wish to make a choice, your pension payments will be withdrawn from the same investment option(s) you have initially invested in and in the same proportion.

## Section 6: Payment instructions

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

Account name

Bank/Building Society/Credit Union name

BSB number

Account number

## Section 7: Frequency and amount of Pension

Please read the section titled 'Receiving Your Pension' – minimum and maximum allowable payments of the Product Disclosure Statement prior to completing this section. Any nominated amount will be the gross pension payable. **The actual after-tax pension will differ depending on your personal tax rate.**

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

## Section 8: Nomination of Reversionary Pensioner

You may nominate a spouse or in some circumstances, a child, as your Reversionary Pensioner. In the event of your death, this person will be entitled to receive the balance of your allocated payments. Please note that you need to nominate a Reversionary Pensioner on this application form if you wish your pension to pass on to your spouse. Refer to this Product Disclosure Statement for more details.

Reversionary Pensioner name

Date of birth (DD/MM/YYYY)

Relationship

Address

Suburb/Town

State

Postcode

# Pension application (cont.)

## Section 9: Nomination Beneficiary (if you have not nominated a Reversionary Pensioner)

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

**Please note:** percentages must be whole numbers and the total of all beneficiaries must sum to 100 per cent.

Surname	Given names	Relationship (e.g. wife, husband, son)	Portion of benefit
			%
			%
			%
<b>TOTAL</b>			<b>100%</b>

**Please note:** If you wish to make a binding death nomination, please complete a Binding death nomination form instead of the section above. This form is available from the Tools and Forms section of [clubplussuper.com.au](http://clubplussuper.com.au)

## Section 10: Privacy and Applicant's declaration

Club Plus Super complies with the requirements of the Privacy Amendment (Private Sector) Act 2000. A summary of the Club Plus Super Privacy Policy appears in section 4 'More information' of the Pension PDS.

If you wish to see a copy of the full Club Plus Super Privacy Policy, go to [clubplussuper.com.au/privacy-policy](http://clubplussuper.com.au/privacy-policy) or call us on **1800 204 194**

From time to time, we may send members communication material. If you don't want us to use your personal information to send you communication material tick this 'NO' box:  NO

I hereby apply for a Pension with Club Plus Super. I confirm that I have personally received (including an electronic version issued or a print out of it, accompanied by or attached to this application form) and read and understood the Club Plus Pension PDS.

I acknowledge that this application is subject to the terms and conditions of the PDS.

- I am a citizen or permanent resident of Australia or a citizen of New Zealand.
- 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 pension payments will be paid to my nominated bank, building society or credit union account on the dates nominated above.
- I understand that I have 14 days from the date that you confirm my membership to withdraw my application at no cost (Cooling Off period). After the Cooling Off period, I may withdraw my entire balance from the Club Plus Pension at any time, and there will be no charge to me, other than the withdrawal fee, to receive this payment.
- I agree to be notified of changes of details relating to Club Plus Pension through the website and member communications.
- 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 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.

## Section 11: Authorisation

I declare that all the above details are correct.

Member's signature

Date (DD/MM/YY)

## Contact us

pension hotline: 1800 204 194  
email: [member@clubplussuper.com.au](mailto:member@clubplussuper.com.au)  
website: [clubplussuper.com.au](http://clubplussuper.com.au)

Club Plus Superannuation Pty Ltd ABN 26 003 217 990, AFSL No. 245362  
RSE Licence No. L0000529 as trustee of Club Plus Superannuation Scheme  
ABN 95 275 115 088, RSE Registration No. R1000757

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