

# Change my details

## How to complete this form

### Compulsory details

Please complete your member number, full name, address and date of birth details. If you don't know your member number, please complete your full name, address and date of birth to help us find your account.

### Change of name, gender or date of birth

Complete sections 1, 2 and 6.

#### What do I use to prove my change of name, gender or date of birth?

If you have changed your name or are updating your date of birth, you'll need to provide certified proof.

Certified copies of the following documents may be used to prove:

- **Change of name:** Marriage certificate, or change of name certificate from the Births, Deaths and Marriages Registration Office.
- **Correction of a name:** Driver License or Passport and Commonwealth/State statutory declaration
- **Change of gender (and name):** newly issued birth certificate that shows your updated name and gender along with your previous name and gender; or a letter of verification from your relevant state or territory Births, Deaths and Marriages Registration office that states your previous name and gender and your updated name and gender.
- **Date of birth:** Driver licence, passport, birth certificate, or government-issued proof of age card.

Note: If your address has changed in the last 6 months, please provide a current bill, bank statement or rates notice to change your DOB.

### Change of address or email

Complete sections 1, 2 and 6. You **don't** need to provide any supporting documents.

### Non-binding nomination (of a preferred beneficiary)

For a non-binding nomination (i.e. of a preferred beneficiary), complete sections 1, 3 and 6.

#### Further information about nominating your preferred beneficiaries

To make sure that your non-binding nomination (i.e. your nomination of preferred beneficiaries), is valid, please read the following information.

#### Who can I nominate?

Under the AustralianSuper Trust Deed, benefits payable in the event of your death may only be paid out to your dependants

or to your legal personal representative. It is important that you take account of who may qualify as a dependant in your nomination.

The definition of 'dependant' under AustralianSuper Trust Deed includes:

- your spouse (including de facto);
- your children of any age (including step, adopted or ex-nuptial);
- any other person who is or was wholly or partially financially dependent<sup>1</sup> on you; or
- your interdependants (those with whom you have a close personal relationship, you live with, and you provide them or they provide you with financial support, and domestic and personal care. You also have an interdependent relationship if you have a close personal relationship but are unable to meet the other requirements because one or both of you suffer from a physical, intellectual or psychiatric disability).

#### Who decides?

Under the Trust Deed, the Trustee alone is generally responsible for deciding to whom, and in what proportion, your death benefit should be paid. In making this decision, however, the Trustee will take into account your nomination of preferred beneficiary(ies). For your nomination to be effective, it is important that you keep it up to date, particularly if your family or marital circumstances change. If you have no eligible dependants to whom the benefit can be paid, the Trustee may pay the benefit to your legal personal representative for inclusion in your estate.

#### Can I make a binding nomination?

Yes, you can make a binding beneficiary nomination by completing and returning the *Making, changing or cancelling a binding death benefit nomination* form.

Choice Income and TTR Income members can make a binding nomination or reversionary beneficiary nomination, by visiting [australiansuper.com/forms](https://australiansuper.com/forms), selecting Forms in the Retirement tab and completing the relevant form.

### Change of bank account

Complete sections 1, 4 and 6 and attach a certified copy of your driver licence, passport or government-issued proof of age card.

### Change regular payment instructions

Complete sections 1, 5 and 6.

### Declaration

You must sign and date Section 6 before returning this form.

## How to certify your documents

### 1 Get your ID documents and photocopies ready for certification

Take both the ORIGINAL and a photocopy of your CURRENT driver licence, passport or government-issued proof of age card to someone who is authorised to certify ID (e.g. a pharmacist, a medical practitioner, a lawyer, a post office employee, a financial adviser or planner, or a police officer). If you are using your driver licence or government-issued proof of age card, you'll need to photocopy BOTH sides.

If you're withdrawing more than \$10,000 you'll need additional ID:

- Above \$10,000 and up to \$50,000: a CURRENT bill (power, telephone) or bank statement issued within the last three months.
- Above \$50,000 and up to \$75,000: two CURRENT bills (power, telephone) or bank statements issued within the last three months.
- Above \$75,000: three CURRENT bills (power, telephone) or bank statements issued within the last three months.

All ID must have the same name and mailing address that we have for your super account.

### 2 Ask them to certify your identification (ID)

To certify your ID, the authorised person needs to compare the photocopy to the ORIGINAL and include the following details on the copy:

- stamp or write 'I certify that this document is a true copy of the original sighted by me on this day [date],[month],[year]'
- their qualification (such as pharmacist)
- their name
- address
- type of authority (including any identifying number)
- their signature and the date it was signed.

Every page of the documents we receive from you must have been certified and dated within the last 6 months. Undated documents will be rejected.



To view the full list of people who can certify your documents, go to [australiansuper.com/IDHelp](https://australiansuper.com/IDHelp) for more information.

<sup>1</sup> As defined by Superannuation law.

## Change my details



Please complete in pen using CAPITAL letters and print (x) to mark boxes where applicable. Read the Privacy Collection Statement on page 4 of this form to see how AustralianSuper uses your personal information.

### 1 Existing member details

Last name		Mr		Mrs		Ms		Miss		Dr	
<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>	
First name/s		Date of birth									
<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>	
Street address											
<input type="text"/>											
Suburb/Town						State		Postcode			
<input type="text"/>						<input type="text"/>		<input type="text"/>			
Postal address (if different from Street address)											
<input type="text"/>											
Suburb/Town						State		Postcode			
<input type="text"/>						<input type="text"/>		<input type="text"/>			
Telephone (business hours)				Telephone (after hours)				Mobile			
<input type="text"/>				<input type="text"/>				<input type="text"/>			
Email											
<input type="text"/>											

Please supply your member number and/or account number – whichever is relevant to the account you currently hold. If you have more than one of the same type of account, you'll need to complete another form.

Account number
<input type="text"/>

### 2 Updated member details

Please only fill in the details that you want us to change.

If you've made changes to your name and/or gender, or your date of birth is different from your current details, you need to provide evidence. To update your address or email, you **don't** need any supporting documents.

I'm changing my:

- ☐ **Name:** I have attached my certified proof of identity to this application (e.g. marriage certificate or change of name certificate from the Births, Deaths and Marriages Registration Office).
- ☐ **Name and gender:** I have attached my certified proof of identity to this application (newly issued birth certificate, and a letter of confirmation or verification that states both previous and current names, from the Births, Deaths and Marriages Registration office.)
- ☐ **Date of birth:** I have attached my certified proof of identity to this application (e.g. driver licence, passport, birth certificate, or government-issued proof of age card).

See *How to certify your documents* outlined on page 1.

Last name		Mr		Mrs		Ms		Miss		Dr	
<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>	
First name/s		Date of birth									
<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>	
Street address											
<input type="text"/>											
Suburb						State		Postcode			
<input type="text"/>						<input type="text"/>		<input type="text"/>			
Postal address (if different from Street address)											
<input type="text"/>											
Suburb/Town						State		Postcode			
<input type="text"/>						<input type="text"/>		<input type="text"/>			

## 2 Updated member details (continued)

If you'd like to change your mobile number, you can do so when you log in to your account on the website, or via the My Details section on the AustralianSuper mobile app. Or call us on **1300 300 273** 8am to 8pm AEST/AEDT weekdays.

Email

## 3 Nominate your beneficiaries

**Provide details of your legal personal representative or any dependants<sup>1</sup> who may be entitled to your super (including any insurance benefit) if you die.** To make your nomination binding, download the *Making, changing or cancelling a binding death benefit nomination* form available at [australiansuper.com/forms](http://australiansuper.com/forms) Or to make a reversionary nomination, download the *Making, changing or cancelling a reversionary beneficiary nomination (pension members)* form available at [australiansuper.com/forms](http://australiansuper.com/forms)  
Please use the two decimal point spaces provided for the benefit percentages (% of benefit) section to add up to 100.00%.

Full name	Relationship <sup>1</sup>	Residential address	% of benefit
	<input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Interdependent	<input type="checkbox"/> Financial dependent <input type="checkbox"/> Legal personal representative (executor or administrator of your estate)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %
	<input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Interdependent	<input type="checkbox"/> Financial dependent <input type="checkbox"/> Legal personal representative (executor or administrator of your estate)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %
	<input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Interdependent	<input type="checkbox"/> Financial dependent <input type="checkbox"/> Legal personal representative (executor or administrator of your estate)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %
	<input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Interdependent	<input type="checkbox"/> Financial dependent <input type="checkbox"/> Legal personal representative (executor or administrator of your estate)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %
	<input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Interdependent	<input type="checkbox"/> Financial dependent <input type="checkbox"/> Legal personal representative (executor or administrator of your estate)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %
TOTAL MUST ADD UP TO 100.00%			<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %

<sup>1</sup> As defined by Superannuation law.

When you use this form to nominate beneficiaries, you're telling us which of your dependants you'd like us to pay your account balance if you die. We're not bound by your non-binding nomination, but we use this information as a guide to work out who to pay your benefit to.



## 4 Change your bank account details

**If you want to have your payments made to a different bank account enter the new account details here.**

To change your bank account details, you'll need to provide proof of your identity.

☐ I have attached my certified proof of identity to this application (e.g. driver licence, passport, birth certificate or government-issued proof of age card).

See *How to certify your documents* outlined on page 1.

Name of bank, building society or credit union

Account name - must be held in your name or jointly in your name

BSB number

Account number

☐ Mark this box if you've provided a copy of your bank statement so we can double check your details to avoid any payment delays.

## 5 Update your regular payment details

You can update how often and how much you want to be paid regularly, by completing this section.

Your payments will start on the next available nominated pay date, once your application is fully processed. This can take up to four weeks, or longer in some circumstances. For details on payments see the *Choice Income* and the *TTR Income Product Disclosure Statements (PDS)*. You can change your payment options at any time by logging into your online account.

a) When I'd like to receive my regular payments: Please choose (X) one option only, and fill in month and choose a start date where applicable.

- ☐ Fortnightly (next available payment date)

☐ Monthly.

☐ Quarterly from

☐ Half-yearly from

☐ Yearly from

Choose one (X) start date:

☐ 15th

☐ 28th

☐ soon as possible (next scheduled payment date)

Choose one (X) start date:

☐ 15th

☐ 28th

☐ soon as possible (next scheduled payment date)

Choose one (X) start date:

☐ 15th

☐ 28th

☐ soon as possible (next scheduled payment date)

Choose one (X) start date:

☐ 15th

☐ 28th

☐ soon as possible (next scheduled payment date)

b) I'd like my regular payment amount to be: *Please choose (X) one option only.*

- ☐ **Option 1 (Default):** the minimum amount allowed<sup>1</sup>

☐ **Option 2:** a specific amount<sup>2</sup> for each payment \$   ,     
 For this specific amount, how much do you want this payment amount to increase by each year?<sup>3</sup>  
 Choose one (X) below

☐ 0% (Default) ☐ 1% ☐ 2% ☐ 3% ☐ 4% ☐ 5% ☐ Consumer Price Index (CPI)

☐ **Option 3 (TTR Income members only):** the maximum amount<sup>2</sup> (10% of your account balance)

<sup>1</sup> By law, there is a maximum limit (for TTR Income members only) and a minimum limit on the payment amount you can withdraw from your account balance each financial year, and this varies with your age. Your limits are determined by the actual amount rolled into your account, and are recalculated every year based on your balance on 1 July. For details see the Choice Income or TTR Income PDS. You'll be paid the minimum amount as the default option if the boxes above are not ticked. The minimum payment amount will also be pro-rata (proportionate) by default in the first financial year. This means that in your first financial year, you'll receive a proportion of the minimum annual amount spread over the rest of that first financial year.

<sup>2</sup> If you're a TTR Income member your chosen payment amount must be between your minimum and maximum limits for that financial year; if you're a Choice Income member, your chosen amount must be at least your minimum limit for that financial year. If you choose an amount that is smaller than the minimum, or more than the maximum (for TTR Income members), we'll contact you.

<sup>3</sup> If no relevant box is selected for an annual increase in payment amount, the default option is 0%.

**6** Sign this form

To the best of my knowledge the information I have provided on this form is correct and I have read the Privacy Collection Statement below and I understand how AustralianSuper will use my personal information.

Sign here

Copyright 2019 Cengage Learning. All Rights Reserved. May not be copied, scanned, or duplicated, in whole or in part. WCN 02-200-203

Date \_\_\_\_\_

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Print full name (this must be your correct/new legal name)

[illegible]

## Privacy Collection Statement

Please read this Privacy Collection Statement to see how AustralianSuper uses your personal information.

AustralianSuper Pty Ltd (ABN 94 006 457 987) of Locked Bag 6, Carlton South, Victoria 3053, collects your personal information (PI), to operate, and administer your super account (including insurance) or retirement income account, improve our products and services and keep you informed. If we can't collect your PI we may not be able to provide these services. PI is collected from you but sometimes from third parties. We will only share your PI where necessary to perform our activities with our administrator (Australian Administration Services Pty Ltd, being a part of MUFG Pension & Market Services Holdings Ltd), our insurer (TAL Life Limited, ABN 70 050 109 450, AFSL 237848), our contact centre provider (Concentrix Services Pty Ltd), service providers, as required by law or court/tribunal order, or with your permission. Your PI may be accessed overseas by some of our service providers and, where applicable to your circumstances, by third party service providers of your financial adviser. Our Privacy Policy details how to access and change your PI, as well as our privacy complaints process. For complete details go to [australiansuper.com/privacy](https://australiansuper.com/privacy) or call us on **1300 300 273**.

Please return this completed form to:

**AustralianSuper, Locked Bag 6, Carlton South, Victoria 3053**

or upload a copy at [australiansuper.com/upload-document](http://australiansuper.com/upload-document)

Questions? Call **1300 300 273** or visit **australiansuper.com**