Refresh your income account and top-up your savings



23 October 2025

Who should use this form

Complete this form if you have an income account (TTR Income or Choice Income) and you want to boost your retirement income balance using money from your AustralianSuper super account. Plus, by using this form you'll be able to keep some of your current income account settings.



How to complete this form

You need to complete this form in full:

- after reading the TTR Income or Choice Income Product Disclosure Statement (PDS),
- in pen.
- using CAPITAL letters, and
- marking an (X) in boxes.

To see how AustralianSuper uses your personal information, please read the Privacy Collection Statement at australiansuper.com/CollectionStatement

If you have Member Direct

If you have Member Direct holdings in your super account(s) and want to transfer them to your Choice Income account, please download and complete the Seamless Transfer of your Member Direct account form at australiansuper.com/MemberDirect

Member Direct isn't available for TTR Income accounts, so you'll need to keep your super account open to maintain your holdings or sell them down before opening your TTR Income account.

For detailed information about using this form, what happens to your account settings, income payments and more, please read our Frequently Asked Questions (FAQs) at australiansuper.com/refresh-your-income-account

1 Your personal and	contac	t deta	ails fo	r you	r cı	urre	nt ii	nco	me	ac	COI	unt								
Tell us your current income a			ease cho	oose (X) on	e:														
☐ TTR Income ☐ CI	noice Inco	ome																		
Important tip: Your income position account will be maintained in across to your new account.	your new	income	e accou	nt. The	inve	stmer	nt str	ateg	y in	your	exis	sting	g su	ıper	acco	un	t¹ wi	ll be d		
Current AustralianSuper incom	e accoun	t numb	er																	
Last name														Mr	Mr	S	Ms	Mi	SS	Dr
First name(s)																				
Date of birth		Male	Fem	ale																
D D M M Y Y Y																				
Street address																				
Suburb/Town														State	€		Р	ostco	ode	
Postal address (if different to s	reet add	ress)																		
Suburb/Town													(State	_		P	ostco	ode	
Home telephone		Oth	ner teler	ohone (eg k	ousine	ss)					 1ob	ile							
Email			1 1	-					_										-1	-

If you have more than one AustralianSuper super account, we'll use the investment strategy in your oldest active super account.

2 Do you qualify?			
a) Please complete if you're refreshin Are you 60 to 64 years of age, sti Yes (go to step 3) No (go to step 2b)			
OR			
b) Please complete if you're refreshing I'm 65 or older I'm aged 60 or over and permal I'm aged 60 to 64 and have standard As confirmed by my super fund I have an unrestricted non-present I have an unrestricted non-present.	anently retired opped working for an employ d I've ceased employment due	ver since turning 60	may ask you for evidence)
3 Your AustralianSuper acc		•	
Please provide the details of any Aust a) Your current AustralianSuper super member number	ralianSuper super account y b) Do you want to transfer your entire balance?	ou'd like to transfer: c) How much money do you want to leave in your AustralianSuper super account?1	d) Do you want to transfer a nominated amount to your new income account? ¹
Account 1:	Yes² (go to step 3e) No (go to either step 3c or 3d)	\$6,000 Other amount	\$
Account 2:	Yes² (go to step 3e) No (go to either step 3c or 3d)	\$6,000 Other amount	\$
Account 3:	☐ Yes² (go to step 3e) ☐ No (go to either step 3c or 3d)	\$6,000 Other amount	\$
Please provide the details of any Austr	alianSuper TTP Income acco	unt you'd like to transfer:	
e) Your current AustralianSuper TTR Income account number	f) Do you want to transfer your entire balance?	g) Do you want to transfer a amount to your new TTR	
Account 1:	 Yes² (go to step 3h) No (go to step 3g) 	\$	
Account 2: If you leave 3e) f) g) blank, any existing	Yes² (go to step 3h) No (go to step 3g) g TTR Income accounts you	\$ have will be left open.	

3	Your Australian Super acco	unt(s) that will fun	1	1S
	Tour Australian Super acco	arre(5) triat will rain	d your new account (conti	nued)
Ple	ease provide the details of any Austr	alianSuper Choice Income	e account you'd like to transfer:	
-	ou opened your AustralianSuper Choice l pice Income account may affect your Cen		eiving the Ag e Pension before 1 January 2 wish to seek further advice.	2015, opening a new
	Your current AustralianSuper Choice Income account number	i) Do you want to transfe your entire balance?	j) Do you want to transfer a nor amount to your new Choice I	
Ac	count 1:	 Yes² (go to step 4) No (go to step 3j) 	\$	
Ac	count 2:	Yes² (go to step 4) No (go to step 3j)	\$	
nis v		ne amount in your TTR Income c	ome account. Any insurance cover you have wor Choice Income account will be paid to you.	
	se one (X) option only for where vo			
	se one (X) option only for where yo Option 1:			
		ur payments and fees will	be taken from:	
	Option 1: Take my payments and fees from	ur payments and fees will	be taken from: Investment options	
	Option 1: Take my payments and fees from with the highest balance (default) OR Option 2:	the investment option (go to step 5).	be taken from: Investment options PreMixed options High Growth Balanced	
	Option 1: Take my payments and fees from with the highest balance (default) OR	the investment option (go to step 5).	be taken from: Investment options PreMixed options High Growth Balanced Socially Aware	
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	Option 1: Take my payments and fees from with the highest balance (default) OR Option 2: Take my payments and fees from e in proportion to the balance in eac (go to step 5). OR Option 3:	the investment option (go to step 5). ach investment option ch option - pro-rata	be taken from: Investment options PreMixed options High Growth Balanced Socially Aware Indexed Diversified	
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	Option 1: Take my payments and fees from with the highest balance (default) OR Option 2: Take my payments and fees from e in proportion to the balance in eac (go to step 5). OR Option 3: Take my payments and fees in the Number your preferences (e.g. 1, 2 order you'd like your payments and	the investment option (go to step 5). ach investment option ch option - pro-rata order chosen by me.	Investment options PreMixed options High Growth Balanced Socially Aware Indexed Diversified Conservative Balanced Stable DIY Mix options Australian Shares	

5 Nominate beneficiaries

You can choose (X) only one of three options when deciding what happens to your money when you die:

- Reversionary nomination You nominate a person who will receive your account balance as a regular income. Conditions apply for who you can nominate. For details see the *Nominating beneficiaries* section of the *TTR Income PDS* or *Choice Income PDS* (as applicable).
- Binding nomination You provide formal written direction to AustralianSuper to tell us who you want your account balance paid to. If valid, your nomination is legally binding.
- Non-binding nomination You nominate who you'd prefer your account to be paid to. This nomination is not legally binding. For details on nominating beneficiaries, see the *Nominating beneficiaries* section of the *TTR Income PDS* or *Choice Income PDS* (as applicable) or visit australiansuper.com/beneficiary

Please choose (X) one option only.

Option 1: Reversionary (nomination			
		nate as a reversionary beneficiary TTR Income PDS or Choice Incom		gibility see the
Last name			Mr M	lrs Ms Miss Dr
First name (s)				
Relationship to you			Date of	birth M M Y Y Y Y
•		es making a reversionary nomina ces at dss.gov.au if you have que		
	nding death ben	efit nomination form at australia on of the form blank, and go to s		'y and attach it to this
Option 3: Non-binding Please use the two decir		provided for the benefit percenta	ges (% of benefit) section	on to add up to 100.00%.
Full name	Relationship ¹		Residential address	% of benefit
Full name	Relationship¹ Spouse Child Interdependent	Financial dependant Legal personal representative (executor or administrator of your estate)		% of benefit
Full name	Spouse	Legal personal representative		% of benefit %
Full name	Spouse Child Interdependent Spouse Child	Legal personal representative (executor or administrator of your estate) Financial dependant Legal personal representative		%
Full name	Spouse Child Interdependent Spouse Child Interdependent Spouse Child Child	Legal personal representative (executor or administrator of your estate) Financial dependant Legal personal representative (executor or administrator of your estate) Financial dependant Legal personal representative		%
Full name	Spouse Child Interdependent Spouse Child Interdependent Spouse Child Interdependent Spouse Child Child Interdependent Spouse Child Child	Legal personal representative (executor or administrator of your estate) Financial dependant Legal personal representative (executor or administrator of your estate) Financial dependant Legal personal representative (executor or administrator of your estate) Financial dependant Legal personal representative		% ————————————————————————————————————
	Spouse Child Interdependent	Legal personal representative (executor or administrator of your estate) Financial dependant Legal personal representative (executor or administrator of your estate) Financial dependant Legal personal representative (executor or administrator of your estate) Financial dependant Legal personal representative (executor or administrator of your estate) Financial dependant Legal personal representative (executor or administrator of your estate)		% % % % % % % % % % % % % % % % % % %

Orve your financial adviser access to your account details	
If you have a financial adviser, you can give them and their staff access to your TTR Income or Choice Income account (as applicable) below. If not, go to step 7.	
If you have previously granted a financial adviser access to your account details, providing details of a new adviser here will remove access for the previous adviser.	
Full name of financial adviser ¹	
Name of business	_
. tame 3. 5ds. 1655	
Adviser email address ¹	_
Telephone Licensee AFSL number ASIC Financial adviser representative number ¹	
¹ Mandatory fields	
7 Provide proof of your identity	
Please choose (X) one of the following options: In the last 24 months, I've previously provided certified ID documents or passed electronic verification for an AustralianSuper income account application or a change to my income account, and haven't changed my name, date of birth, address, bank account details or mobile number. This means, I don't need to resupply proof of my identity. Next: Go to step 8. OR I don't meet the above criteria and need to provide proof of my identity. Next: Complete (X) one of the options below.	
my name, residential address and date of birth to GBG (an identity verification service provider) as part of an information match request for the sole purpose of verifying my identity. I understand this includes an information match request with credit reporting agency, Illion, who will confirm with AustralianSuper whether my personal information (in whole or in part) matches their credit information file. I also understand that they won't share any other information from my credit file with AustralianSuper, and that accessing this information doesn't involve credit checking and will not affect my credit score. Please complete and provide details for any TWO of the following.	
1. Full name as appears on my Medicare card	
1. Full name as appears on my Medicare card	
Mu Madianra pueda ar is	
My Medicare number is Valid to My reference number	
on this card is	
2. Full name as appears on my driver licence	
Licence number Card number ² Visit australiansuper.com/IDHelp to find	
the card number on your driver licence.	
State of issue Expiry date	
3. My Australian passport number is	
My full name is	
Option 2: I want to attach certified paper copies of my documentation I have attached correctly certified photocopies of my original driver licence, passport or government-issued proof of age card AND a bill or bank statement issued within the last three months. The residential address on at least one of your ID documentation provided must match the address details provided on this application in step 1. Importantly, each page of your photocopied documents must have been certified within the last 6 months. For instructions on how to get your document correctly certified and who can do this, please go to australiansuper.com/IDHelp	

8 Sign this form

In making this application:

- I declare that I have read and understood the TTR Income Product Disclosure Statement or Choice Income Product Disclosure Statement (as applicable) available at australiansuper.com/pds
- I've read and understood the details of this form, and understand my current account will be closed (if I've selected to
 transfer my entire balance in step 3) and a new account with the additional funds will be set up. I agree that my income
 payment amount, income payment frequency, and bank account details in my current retirement income account will be
 maintained in my new account. The investment strategy in my oldest active super account will be carried across to my new
 account.
- I understand if my income payments in my new account are less than the minimum payment required by law, AustralianSuper will set this to the minimum payment amount.
- I understand income payments won't be made from the time my current income account is closed, where I've selected to transfer my entire balance in step 3, and until my new income account is set up.
- If applicable, I've finalised my tax deduction for the personal contributions made to my super account and I've received the confirmation from AustralianSuper.
- I have read the Privacy Collection Statement and I understand how AustralianSuper will use my personal information. AustralianSuper's Privacy Collection Statement is in the PDS and online at **australiansuper.com/CollectionStatement**To the best of my knowledge, the information I have provided on this form is correct.
- I confirm I am either an Australian citizen/permanent resident, a New Zealand citizen or I hold an eligible retirement visa (subclass 405 or 410).
- By providing my email address and/or mobile number, I acknowledge and agree that, where possible, AustralianSuper will provide the following information to me digitally:
 - important legal disclosures (including annual statements, significant event notices and transaction confirmations)
 - other information about Australian Super's products and services, and
 - marketing communications, including about third-party products and services.
- If important legal disclosures are made available on my account online, the AustralianSuper website or the AustralianSuper Mobile App, I agree that AustralianSuper will notify me of this by email or SMS where required. I understand that I can change my communication preferences at any time by calling AustralianSuper on 1300 300 273 or through the Communication preferences section of my account online or the Manage preferences section of the AustralianSuper Mobile App.
- I understand that the personal information I have provided will be used to open my account. I can read the full details on the collection and use of personal information at australiansuper.com/privacy
- I acknowledge that my account will be set up based on the choices I've made in this application.

ngii nere	Date
	D D M M Y Y Y
Print full name	



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Please upload a scanned copy of your completed form to us via our website at australiansuper.com/upload-document or post it to AustralianSuper, Locked Bag 6, CARLTON SOUTH VIC 3053

Questions? Call 1300 300 273 or visit australiansuper.com/retirement