

Change of details form

For pension members

Please use **BLOCK LETTERS** and **black ink**.
Complete information below to change your details.

Send your completed form to:

Australian Ethical Super, Locked Bag 20013, Melbourne VIC 3001.

Important notes

To update your contact details or update your preferred beneficiaries, please log onto the secure member portal at australianethical.com.au or by contacting us on 1300 134 337

Please use this form if you wish to:

- Update your name
- Switch investment options in the Fund
- Update the drawdown order of pension payments
- Change bank account details
- Update pension payment frequency

Attach documentation if your personal details have changed

Name changes- You will need to provide a certified copy of either a Marriage Certificate, Deed Poll or Change of Name Certificate from the Births, Deaths and Marriages Registration Office.

Bank detail changes - attach a copy of a recent bank statement showing your name, account number and BSB.

If the required supporting documentation is not provided, the payment of your benefit will be delayed.

Step 1: Member details

Member number

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For change of name, please record your old name below, and provide your new name in Step 2.

Title

Mr Mrs Ms Miss Other, please specify

Surname

Date of birth

D	D	M	M	Y	Y	Y	Y
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Male Female

Full given name(s)

Phone number

Mobile

Email

Step 2: Change of name

Member

Previous name

New name

If you have changed your name you will need to provide a certified copy of either a Marriage Certificate, Deed Poll or Change of Name Certificate from the Births, Deaths and Marriages Registration Office.

Step 3: Switching your investment options

Investment options

Options	Percentage*
Defensive	
Conservative	
Balanced (pension)	
Growth	
International Shares	
Australian Shares	
TOTAL	100%

*Ensure that your investment selections total 100% and that each option is in whole percentages.

Step 4: Pension payment drawdown

Pension payment drawdown order

You can nominate 2 different ways in which to draw your pension payments:

You can nominate to drawdown proportionally from your chosen investment options. This will deduct pension payments from the same proportion split as your account balance is invested in.

Descending deduction from each option and we will deduct payments from the first option until your investment in that option is exhausted, and then deduct payments from the second option and so on.

I wish to drawdown proportionately from my chosen investment option.

I wish to select a drawdown from my chosen investment options. (Please complete option below)

Descending drawdown

Options	Drawdown order - number from 1 to 6
Defensive	
Conservative	
Balanced (pension)	
Growth	
International Shares	
Australian Shares	
	1 to 6

Step 5: Pension payment

Please ensure this form is completed and returned at least 14 days prior to your next payment, otherwise the changes may take effect from the following payment.

Bank account details

Provide details of the account into which you would like your pension paid. The account must be in your name and can be a joint account:

Name of financial institution	Branch
<input type="text"/>	<input type="text"/>
BSB number	Account number
<input type="text"/>	<input type="text"/>
Account holder name	Account holder 2 name (if joint account)
<input type="text"/>	<input type="text"/>

I have attached a copy of a recent bank statement showing your name, account number and BSB.

Step 6: Pension payment frequency

Bank account details

Select the frequency you would like your pension paid (one selection only):

<input type="radio"/> monthly	<input type="radio"/> six-monthly (starting in) <input type="text" value="Month"/>
<input type="radio"/> quarterly (starting in) <input type="text" value="Month"/>	<input type="radio"/> annually in (not July) <input type="text" value="Month"/>

Payments will be made on the 15th day of the month at the elected frequency. Quarterly payments and six-monthly payments can be made in any month.

Select your annual pension amount (one selection only). Refer to Section 2 of the Additional Information Booklet for details.

Amount of \$ OR minimum OR maximum
(only an available option for transition to retirement pensions)

For part of a year, a pro-rata minimum amount is calculated based on the payment period from commencement day.

Maximum pension amounts are not pro-rata.

Step 7: Signatures

- The details that I have provided are true and correct.
- I am aware that I may ask my superannuation provider for information about any fees or charges that may apply, or any other information and do not require any further information.
- I have received, read, and agree to the terms outlined in the Australian Ethical Super Product Disclosure Statement (PDS).
- I have received, read, and agree to be bound by the Privacy Collection Notice (Super) and the Privacy Policy.
- I authorise Australian Ethical Super to give effect to the changes outlined in this document.

Signature

Date

<input type="text" value="D"/>	<input type="text" value="D"/>	<input type="text" value="M"/>	<input type="text" value="M"/>	<input type="text" value="Y"/>	<input type="text" value="Y"/>	<input type="text" value="Y"/>	<input type="text" value="Y"/>
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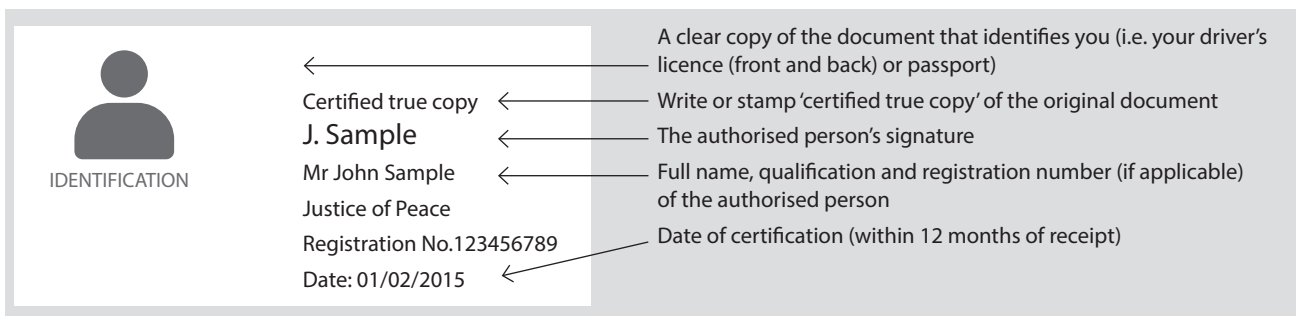
Signatory's full name (please print)

Proof of identity

As a requirement of the Anti-Money Laundering and Counter-Terrorism Financing Act 2006 (AML/CTF legislation), you need to provide identification documentation with this transfer request to prove you are the person to whom the super entitlements belong. Please provide to us either one certified primary photographic ID document or one certified primary non-photographic ID document PLUS one certified secondary document as listed below.

People who can certify your identification documents include:

- a permanent employee of Australia Post who has two or more years of continuous service
- an officer of a financial institution, such as a bank, who has two or more years of continuous service
- a chartered accountant who is a member of the Institute of Chartered Accountants in Australia, CPA Australia or the National Institute of Accountants with two or more years continuous membership
- a legal practitioner (such as a solicitor) who is enrolled on the roll of the Supreme Court of a state or territory, or the High Court of Australia
- a Justice of the Peace
- a police officer.



The diagram shows a sample of a certified true copy of an identification document. On the left is a grey silhouette of a person with the word 'IDENTIFICATION' below it. To the right of the silhouette is the text: 'Certified true copy', 'J. Sample', 'Mr John Sample', 'Justice of Peace', 'Registration No.123456789', and 'Date: 01/02/2015'. Arrows point from this text to a list of requirements on the right: 'A clear copy of the document that identifies you (i.e. your driver's licence (front and back) or passport)', 'Write or stamp 'certified true copy' of the original document', 'The authorised person's signature', 'Full name, qualification and registration number (if applicable) of the authorised person', and 'Date of certification (within 12 months of receipt)'.

Your primary photographic ID document requirements

You **MUST** supply **ONE** primary document from this list

- Australian Driver Licence (current)
- Australian Passport (not expired more than 2 years)
- International Passport (current)
- Proof of Age Card/NSW Photo Card (current and government issued)

Does your primary identification document contain both a photo AND your current residential address?

- Yes, **no additional identification is required**
- No, you must also supply **one secondary document** that contains your current residential address (see below)

Your secondary photographic ID document requirements

STEP A

Supply **ONE** of the following;

- Birth certificate
- Citizenship certificate
- Centrelink Pension Card (current)

AND

STEP B

Supply **ONE** valid option that contains your current residential address;

- Utility Bill or Council Rates Notice (less than 3 months old)
- Taxation Notice or Centrelink Statement (less than 12 months old)