

Application form checklist

How to complete

Important

Please make sure you have all the supporting documents.

This checklist can help you make sure you send everything required so that your Australian Ethical Pension starts as soon as possible. If there is missing or incomplete information, you may experience a delay on your application.

Australian Ethical Pension Application Form

Dated and signed

Complete Rollover section

Only applicable if you want to consolidate other super accounts into your new Australian Ethical Pension account. Note a Retirement account can only receive one lump sum amount so your super must be consolidated into an Australian Ethical Superannuation account before commencement of your pension. Refer to Section 2 of the Pension Additional Information Booklet for further details.

Complete Personal Contribution Tax deduction

Before you exit from your super fund and If you intend on claiming a tax deduction, if any, on a personal contribution, please lodge your notice of intention to claim using an Australian Taxation Office (ATO) prescribed form before you start your pension. You will not be able to claim a deduction after your pension has commenced.

Tax File Number (TFN) declaration form

If you are under 60 years of age, to ensure your pension payments are eligible for concessional tax treatment, please complete the Tax File Number (TFN) declaration form.

Provide copy of a bank statement showing your full name, BSB and account number

This statement needs to be issued within the last 6 months.

Binding Death Nomination form

Signed (not digital) and correctly dated. Please post the signed form to **Locked Bag 20013, Melbourne VIC 3001**.

Complete 'Adviser Information' section on your Pension Application form.

To authorise your adviser (third party) to view your information in relation to your Australian Ethical account and charge an adviser service fee if applicable.

Certified identification documents

ID is still valid/current

ID is certified correctly by an authorised certifier

Special instructions for consolidation for a Pension account

Super consolidated to an existing Australian Ethical Super account and ready to commence a Pension account

Super Account Member number: _____

If you have multiple superannuation accounts and contributions prior to commencing your pension contribution, an Australian Ethical Super 'holding' account will be set up to consolidate the following:

Number of contributions: _____ \$ _____ contributions

Number of rollovers: _____ \$ _____ rollovers

Additional instructions (for example if you wish to have transactions done in a particular order):