

Change of pension details form

For Pension members

Please use **BLOCK LETTERS** and **black ink**.

Important notes

To update your contact details or update your preferred beneficiaries, please log onto the secure member portal at australianethical.com.au/login or by contacting us on 1800 021 227.

Please use this form if you wish to:

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

Send your completed form to:

Australian Ethical Super, Locked Bag 20013,
Melbourne VIC 3001

Or login to the member portal at australianethical.com.au/login and upload the completed forms under the 'Contact Us' tab.

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: Investor details

Member number

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 (DD/MM/YYYY)

Male Female

Full given name(s)

Phone number

Mobile number

Email

Step 2: Change of name

Member's previous name

Member's 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	<input type="text"/> %
Conservative	<input type="text"/> %
Balanced (pension)**	<input type="text"/> %
Balanced (accumulation)***	<input type="text"/> %
Growth	<input type="text"/> %
International Shares	<input type="text"/> %
Australian Shares	<input type="text"/> %
TOTAL	100%

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

**Available for account-based Pensions only

***Available for Transition to Retirement (TTR) accounts only

Step 4: Pension payment drawdown

You can nominate 3 different ways in which to draw your pension payments:

Option A - Proportionately from my investments (pro rata).

Choose this option if you would like your pension payments to be drawn proportionately from the investment options you are invested in.

Option B - Percentage split according to the nominated investment choice below.

If your selection is unclear or does not add up to 100%, you will be contacted in writing to confirm your selection. Please ensure your selection adds up to 100% to avoid any delay. Once there is no longer enough money in your chosen options, your payments will be paid proportionately from your investments.

Percentage split

Options	Percentage
Defensive	<input type="text"/> %
Conservative	<input type="text"/> %
Balanced (pension)	<input type="text"/> %
Balanced (accumulation)	<input type="text"/> %
Growth	<input type="text"/> %
International Shares	<input type="text"/> %
Australian Shares	<input type="text"/> %
TOTAL	100%

Option C - If you nominate a drawdown order, 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.

Sequential drawdown

Options	Drawdown order [^]
Defensive	<input type="text"/>
Conservative	<input type="text"/>
Balanced (pension)	<input type="text"/>
Balanced (accumulation)	<input type="text"/>
Growth	<input type="text"/>
International Shares	<input type="text"/>
Australian Shares	<input type="text"/>

[^]Please number your drawdown from 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. **You must also provide a copy of a bank statement showing your full name, BSB and account number. This statement needs to be issued within the last 2 years.**

Name of financial institution

Branch

BSB number

Account number

Account holder name

Account holder 2 name (if joint account)

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):

monthly

six-monthly (starting in)

Month

quarterly (starting in)

Month

annually in (not July)

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 the Pension Additional Information Booklet for details.

Amount of
annual pension

\$

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: Signature & Declaration

- 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.

! Please note we currently do not accept electronic signatures on forms. To avoid delays or having to complete this form again, ensure you sign the documents with a wet ink signature (i.e. by hand with a black or blue ink pen).

Signature

Signatory's full name (please print)

Date (DD/MM/YYYY)

Who can certify documents?

Who can certify documents in Australia?

- Permanent employee of the **Australian Postal Corporation** with two or more years of continuous service who is employed in an office supplying postal services to the public.
- Agent of the **Australian Postal Commission** who is in charge of an office supplying postal services to the public.
- **Architect**
- **Australian Consular Officer or Australian Diplomatic Officer** (within the meaning of the Consular Fees Act 1955)
- **Bailiff**
- **Bank Officer, Building Society Officer or Credit Union Officer** (with two or more continuous years of service)
- **Commissioner for Affidavits or Declarations**
- **Court Officer**, Registrar or Deputy Registrar of a Court, Judge, Clerk, Magistrate, Master of a Court, Chief Executive Officer of a Commonwealth Court
- **Fellow of the National Tax Accountant's Association**
- **Finance Company Officer** (with two or more continuous years of service with one or more finance companies)
- **Financial Adviser or Financial Planner**
- **Justice of the Peace**
- **Holder of a Statutory office not specified in another item**
- **Legal Practitioner**
- **Marriage Celebrant** (registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961)
- **Medical practitioner, Chiropractor, Dentist, Nurse, Optometrist, Physiotherapist, Psychologist, Midwife, Occupational Therapist**
- **Member of Chartered Secretaries Australia**
- **Member of Engineers Australia** (other than at the grade of student), a Registered Professional Engineer of Professionals Australia or registered under a law of the Commonwealth, a State or Territory or registered on the National Engineering Register by Engineers Australia
- **Member of the Australasian Institute of Mining and Metallurgy**
- **Member of the Australian Defence Force** (who is an officer; or a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with two or more years of continuous service or a warrant officer within the meaning of that Act)
- **Member of the Governance Institute of Australia Ltd**
- **Member of the Institute of Chartered Accountants in Australia and New Zealand**, the Australian Society of Certified Practising

- **Accountants**, Member of the Institute of Public Accountants or the Association of Taxation and Management Accountants
- **Member of Commonwealth Parliament, State Parliament, Territory Legislature or a Local Government Authority** (State or Territory)
- **Migration agent registered under Division 3 of Part 3 of the Migration Act 1958**
- **Minister of Religion** (under Subdivision A of Division 1 of Part IV of the Marriage Act 1961)
- **Notary Public**
- **Officer with, or Authorised Representative of an Australian Financial Services Licensee** (who has had at least two years of continuous service with one or more licensees)
- **Officer with, or a credit representative of, a holder of an Australian credit licence** (who has had at least two years of continuous service with one or more licensees).
- **Permanent employee of the Commonwealth** (or Commonwealth Authority) **or a State or Territory** (or State or Territory Authority) **or a Local Government Authority** with two or more years of continuous service
- **Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made**
- **Pharmacist**
- **Police Officer, Sheriff or Sheriff's Officer**
- **Senior Executive Service Employee of the Commonwealth** (or Commonwealth Authority) **or a State or Territory** (or State or Territory Authority)
- **SES Employee of the Commonwealth**
- **Teacher employed on a full-time basis at a school or tertiary education institution**
- **Trade marks attorney, Patent Attorney**
- **Veterinary surgeon**

Who can certify documents outside of Australia?

- **an authorised staff member of an Australian Embassy, High Commission or Consulate**
- **an authorised employee of the Australian Trade Commission** who is in a country or place outside Australia
- **an authorised employee of the Commonwealth of Australia** who is in a country or place outside Australia
- **a Member of the Australian Defence Force** who is an officer or a non-commissioned officer with two or more years of continuous service
- **Notary Public from a country ranked 129 or below in the latest Transparency International Corruptions Perception Index: [transparency.org](https://www.transparency.org)**

 If you have any questions, please contact Australian Ethical Super on 1800 021 227.

Australian Ethical Superannuation Pty Ltd (ABN 43 079 259 733, RSE L0001441, AFSL 526 055),
Trustee of the Australian Ethical Retail Superannuation Fund (ABN 49 633 667 743, USI/SPIN AET0100AU)

T 1800 021 227 | W australianethical.com.au