

Step 4: Changes to my contact details

Phone [daytime]

Mobile

Street number/PO Box

Street name

Suburb/Town

State

Postcode

Email

Step 5: Switch from a Transition to Retirement account to an Account Based Pension account

For Pension members only

To switch your account from a Transition to Retirement to an Account Based Pension, you need to confirm one of the following:

- ☐ You have reached your preservation age and are permanently retired
- ☐ You have ceased an employment arrangement on or after turning age 60
- ☐ You are 65 or over

Step 6: Non-binding beneficiary nomination

If you die Australian Ethical Super will pay your benefit to your dependants as it considers appropriate, or to your legal personal representative. You can nominate your preferred beneficiaries below to assist the Trustee in its decision.

1. Name of dependant

☐ Spouse ☐ Child ☐ Dependant ☐ Legal personal representative

% of benefit

2. Name of dependant

☐ Spouse ☐ Child ☐ Dependant ☐ Legal personal representative

% of benefit

3. Name of dependant

☐ Spouse ☐ Child ☐ Dependant ☐ Legal personal representative

% of benefit

Check total

100%

- ❗ Percentage must be in whole numbers. Total percentage of benefit nomination must add up to 100%. Please attach a note with additional Dependants if needed.
- ❗ You can also make a Binding Beneficiary Nomination that requires the Trustee to pay your death benefit to one or more dependants specified by you – the form is available at australianethical.com.au

Step 7: Member declaration

Checklist:

1. ☐ Have you notified your employer of your change of details?
2. ☐ Have you signed and dated this form?

I Declare that:

- The information I have provided and any associated documentation in support of the changes advised in this form are, to the best of my knowledge, true and accurate.
 - I understand Australian Ethical Super will rely on this information in good faith and my record kept by Australian Ethical Super will reflect the information in this form.
 - I will immediately notify Australian Ethical Super if any of my personal details change in the future.
 - I understand and accept the information contained in this form may be shared with representatives, advisers and service providers of Australian Ethical Super and my employer(s).
 - I understand that the Trustee accepts no responsibility for either the incorrect nomination of beneficiaries or the incorrect completion of this form.
 - I have received, read, and agree to be bound by the Privacy Collection Notice (Super) and the Privacy Policy available at australianethical.com.au/privacy-policy/
- ❗ Please note if you are using an electronic signature, this must be signed using OneSpan, DocuSign, or Adobe Acrobat Sign, and the forms will need to be accompanied by a time-stamped certificate.

Your signature

X

Date

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