



Change of pension details form

For pension members

Important: If you make any amendments or corrections on the form due to an error, please acknowledge the changes by putting your initials and date on where the changes have occurred, otherwise the application will be invalid.

Complete information below to change your details.

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

Read the Privacy Collection Statement (Super) at australianethical.com.au/privacy-policy to see how we use your personal information.

Important notes

To update your contact details (eg. phone, address, email) or update your preferred beneficiaries, please log onto the secure member portal at australianethical.com.au or contact us on 1800 021 227.

To update your name, please complete a 'Change of name or date of birth' form available on our website.

Please use this form if you wish to:

- Switch investment options
- Update the drawdown preference for pension payments
- Change bank account details
- Update pension payment frequency

Send your completed form to:

Australian Ethical Super, GPO Box 3117
Brisbane QLD 4001

Or login to the member portal at australianethical.com.au/login and upload your completed form under the 'We're here to help' section".

Step 1: Member details (must be completed) (This section is used to verify your membership in the fund, not to update your details)

Account number

Title (Optional)

☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Mx ☐ 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)

Mobile

Email

Residential address

Suburb

State

Postcode

Country

Step 2: Switch from a Transition to Retirement account to an Account Based Pension account

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 3: Switching your investment options

Investment 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%

*Please 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 7.

Step 5: Change of 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

BSB

Account number

Name of account holder

Name of account holder 2 (if joint account)

I have attached a bank statement (no older than 6 months) showing the nominated account name and number.

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

Step 6: Pension payment frequency

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

bi-monthly

monthly

quarterly

(starting in):

MONTH

six-monthly

(starting in):

MONTH

annually

(not July)

MONTH

Payments will be made on the 15th and for bi-monthly also the 28th 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

Specific amount per payment

OR

minimum

OR

maximum

\$

\$

(available option for Transition to Retirement accounts only):

❗ Please note:

- 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.
- Pension amount entered must be at least the minimum and is reflective of annual pension amount.

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 if you are using an electronic signature, this must be signed using OneSpan, DocuSign, Annature or Adobe Acrobat Sign, and the forms will need to be accompanied by a time-stamped certificate.

Signature

X

Date form signed (DD/MM/YYYY)

Signatory's full name (please print)

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)

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