

Change of Details Form

For individuals

Please use **BLOCK LETTERS** and **BLACK INK**.
Complete information below to change your details.

SEND YOUR COMPLETED FORM TO:

Australian Ethical Super, Locked Bag 5125, Parramatta NSW 2124.

STEP 1 – MEMBER 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

Male Female

Full given name(s)

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 – CHANGE OF CONTACT DETAILS

NEW CONTACT DETAILS

Home phone number

Mobile phone number

Email address

If you provide a new email address we will set your communication preference to online by default. You can change your communications preferences in client access on our website, or by calling us.

RESIDENTIAL ADDRESS (PO Box is NOT acceptable)

Street number and name

Suburb

State

Postcode

Country

POSTAL ADDRESS (If different to residential address)

Street number and name

Suburb

State

Postcode

Country

STEP 4 – SWITCHING YOUR SUPER OPTIONS

Select your desired super option or spread of options.

Options	Existing account balance	Future contributions
No change	<input type="checkbox"/>	<input type="checkbox"/>
Defensive		
Conservative		
Balanced		
Advocacy		
Growth		
Smaller Companies		
International Shares		
TOTAL*	100%	100%

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

STEP 5 – NOMINATING OR CHANGING PREFERRED BENEFICIARIES

Update the person(s) who you would prefer to receive your super in the event of your death. This can include your spouse, defacto partner, children, a person with whom you have an interdependency relationship, or a person who is financially dependent upon you. You can also nominate your legal personal representative(s). If you wish to elect otherwise please seek legal advice. The nomination will replace any existing preferred beneficiaries already nominated, but will not replace a standing valid binding nomination.

These nominations are **non-binding** and will only be used by Australian Ethical Super as a guide.

Name	Relationship	Percentage
TOTAL		100%

If you would like your nominated beneficiaries to be **binding** on Australian Ethical Super, then complete the Binding death benefit nomination form, which is available on our website.

STEP 6 – REGULAR VOLUNTARY PERSONAL CONTRIBUTION

If you would like to provide new bank account details for your Direct Debit arrangement, please complete the 'Contribution Form' instead.

I would like to change the frequency and amount of my regular voluntary personal contribution payment.

Amount: \$ Frequency: monthly quarterly

Please cancel my existing regular voluntary personal contributions.

I understand that if my request to cancel my regular contribution arrangement is received within 14 days of the next scheduled payment contribution, a final contribution may be deducted from my account.

STEP 7 – SIGNATURE(S)

Signature

Previous signature (if changing name)

Date

Signatory's full name (please print)

Date

Previous signatory's full name (please print)

Contact us

Phone: 1300 134 337
Email: members@australianethical.com.au
Address: Locked Bag 5125, Parramatta NSW 2124
Web: australianethical.com.au