

Member details amendment request

Information sheet

When to use this form

Use this form to amend your plan details for either your Retirement Bond, Personal Super Bond or RLA Personal Super Plan.

Changing your selected retirement date

You may alter your selected retirement date to any age after you reach preservation age. However, your benefit will only be paid at that age if you are eligible to receive it under superannuation law.

As per superannuation legislation, preserved benefits can only be paid when one of the following events occurs:

- You reach age 65.
- You have retired from the workforce as a result of permanent incapacity or invalidity.
- The trustee consents to a release owing to severe financial hardship (conditions apply).
- The Australian Taxation Office (ATO) approves a payment in circumstances under compassionate grounds (conditions apply).
- Permanent retirement on or after reaching preservation age (refer to the **preservation ages** table for details).
- On death, when your benefits will normally be paid to your dependants or your personal legal representative.
- If you cease employment after age 60.
- Total and Permanent Disablement (only for RLA Personal Super Plan, if applicable).
- Or complying with any other condition of release specified under Superannuation law.

Preservation ages

Date of birth	Preservation age
Before 1 July 1960	55 years
1 July 1960 – 30 June 1961	56 years
1 July 1961 – 30 June 1962	57 years
1 July 1962 – 30 June 1963	58 years
1 July 1963 – 30 June 1964	59 years
On or after 1 July 1964	60 years

Contributions for members aged 67 years or over

Once you're 67 years or over, you can only continue to make certain contributions to your Resolution Life super account if you meet the **work test** or can use the **work test exemption** for the financial year the contributions are made.

Meeting the **work test** means you've been gainfully employed for at least 40 hours within 30 consecutive days in the financial year the contributions are made.

To use the **work test exemption**, you must satisfy the following conditions:

- you've met the work test in the previous financial year
- you haven't been, and don't intend to be, gainfully employed for at least 40 hours within 30 consecutive days in the financial year the contributions are made
- your total super balance with all super providers was below \$300,000 at 30 June of the previous financial year, and
- you haven't previously made contributions to super using the work test exemption.

For more details about the contribution rules, visit resolutionlife.com.au and search for **super contribution rules when you're 67 or over**.

Nomination of dependant(s)

You may nominate one or more dependants to whom you would like your benefit to be paid in the event of your death. The Trustee will take your nomination into account, but has the discretion to pay part or all of the benefit to a dependant or dependants other than those you have nominated.

Who is a dependant?

Under the terms of the Trust Deed, 'Dependant' includes:

- your spouse
- your de facto spouse
- your widow
- your widower
- your child or children
- any adopted child or children of a member
- any person who in the opinion of the Trustee is financially dependent on the member either at the time of death or at the date of payment

– any person who was at the date of your death (in the opinion of the Trustee) in an interdependency relationship with you (generally a close personal relationship between two persons who live together, where one or each of them provides the other with financial support, domestic support and personal care).

Do you have to nominate a dependant?

You are not obliged to nominate any dependants.

A new nomination can be made at any time with the approval of the Trustee and will replace any previous nomination.

Binding death benefit nominations are also available under the RLA Personal Super Plan. Go to **resolutionlife.com.au/forms** to download the relevant form, or you can contact the Resolution Life Customer Service Centre on 133 731 to request a form.

Please keep this information sheet for your records—
don't return it with your completed form(s).

Member details amendment request

Use this form to amend your member or plan details for either your Retirement Bond, Personal Super Bond or RLA Personal Super Plan

Please print in CAPITAL LETTERS and place a cross in any applicable boxes.

1. Plan details

Please select your product type (one option only):

- Retirement Bond
- Personal Super Bond
- RLA Personal Super Plan

Plan number(s)

2. Member details

Member number

Title

Date of birth

Surname

Given name(s)

Residential address (a PO Box is not acceptable)

Suburb

State

Postcode

Contact phone number

Mobile number

Email address

Address for communications

Please cross if same as residential address.

Address

Suburb

State

Postcode

3. Change your selected retirement date or age

You may alter your selected retirement date to any age after you reach preservation age. Refer to the information sheet for further information.

Select one option only:

Change your selected retirement date:

New selected retirement date

Change your selected retirement age:

New selected retirement age

 years

! To determine your eligibility to make or receive contributions after you turn 67, please refer to the information sheet.

4. Change your protection option (Retirement Bond only)

I wish to add/increase the protection option to:

I wish to remove/decrease the protection option from:

Investment portfolios:

- Managed \$ or %
- Matched \$ or %
- Secure \$ or %
- Property biased \$ or %

Notes:

- The protection option is not available on any other portfolio.
- The Cash portfolio is automatically protected.

5. Investment portfolio switch

- The minimum portfolio switch is \$1,000.
- The minimum portfolio balance is \$1,000.
- **Retirement Bond or Personal Super Bond** – A switching fee will apply if there are more than two portfolio switches performed within your plan anniversary dates.
- **RLA Personal Super Plan** – A switching fee will apply if more than six portfolio switches are performed within your plan anniversary dates.

Amount (\$)	Percentage (%)	Portfolio switching FROM:	Portfolio switching TO:
<input type="text"/>	or	<input type="text"/>	<input type="text"/>
<input type="text"/>	or	<input type="text"/>	<input type="text"/>
<input type="text"/>	or	<input type="text"/>	<input type="text"/>
<input type="text"/>	or	<input type="text"/>	<input type="text"/>

6. Nomination of dependants

- !** – Your nominations must be in whole percentages.
 – Your nominations must total 100%.
 – Refer to the information sheet for information on nominating your dependants.

Name of preferred dependant 1	Date of birth	Relationship to member	% of benefit
<input type="text"/>	<input type="text" value="DDMMYYYY"/>	<input type="text"/>	<input type="text" value=" "/>
Address of dependant 1			
<input type="text"/>			

Name of preferred dependant 2	Date of birth	Relationship to member	% of benefit
<input type="text"/>	<input type="text" value="DDMMYYYY"/>	<input type="text"/>	<input type="text" value=" "/>
Address of dependant 2			
<input type="text"/>			

Name of preferred dependant 3	Date of birth	Relationship to member	% of benefit
<input type="text"/>	<input type="text" value="DDMMYYYY"/>	<input type="text"/>	<input type="text" value=" "/>
Address of dependant 3			
<input type="text"/>			

Name of preferred dependant 4	Date of birth	Relationship to member	% of benefit
<input type="text"/>	<input type="text" value="DDMMYYYY"/>	<input type="text"/>	<input type="text" value=" "/>
Address of dependant 4			
<input type="text"/>			

7. Acknowledgement and signature

- I understand that the unit price used will be the unit price applicable on the day that all necessary papers to complete this transaction are received by the Resolution Life Customer Service Centre.
- The trustee reserves the right to delay for up to 30 days any switch of units valued at more than \$100,000 between portfolios. The unit price will be that applicable at the end of the period of delay.

Signature

Date

Where to send this form

Mail or email this completed form to:

Resolution Life Customer Service GPO Box 5441 Sydney NSW 2001 askus@resolutionlife.com.au	Any questions? 133 731
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