

Switch and Pension drawdown nomination

Important information

Please note:

Changes will be made effective the date your completed documentation is received at our principal office of administration.

1. Personal details

(All fields must be completed)

Account number

(If changing your name and/or address, please write your name and/or address that was last notified.)

Title

Date of birth

D	D	M	M	Y	Y	Y	Y
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Surname

Given name(s)

Postal address

Suburb

State

Postcode

Country

Residential address

Suburb

State

Postcode

Country

Mobile number

Alternate phone number

Email address

2. Switching investment options and/or changing your pension payment drawdown order

Switching investment options. Please cross ☒ the appropriate box.

- ☐ Please switch my investment options and alter my pension payment drawdown order to match the same ratio as my investment mix at the time of payment. (Complete the 'Switch from' and 'Switch to' columns only.)
- ☐ Please switch my investment options and alter my pension payment drawdown order to what I specify over the page marked with the numbers 1 to 9 in the payment order column. For example, payments will be made first from the option marked '1' until the funds in that option are exhausted, then from the option marked '2' and so on. (Complete all three columns.)

! Please note: If you do not specify the pension payment drawdown order, we will default the order to first pay pension payments from the most conservative investment option you are invested in. When that option is depleted, we will draw payments from the next most conservative investment option you are invested in, and so on.

If you have previously specified a pension payment drawdown order and do not want to change that order, you must enter that order in the payment order column again.

To fully switch out of any investment option(s), please place 100% or 'ALL' next to each investment option in the 'Switch from' column. If you nominate a percentage amount of less than 100%, we will only withdraw that percentage of the investment option, e.g. if you have \$20,000 in the investment option and specify 50%, we will withdraw \$10,000 from that investment option.

The total proceeds from your specified 'Switch from' investment option(s) will be used to buy the amounts indicated in the 'Switch to' column. Your 'Switch to' column must add up to 100% if using percentages, or to the exact amount specified in A if using dollar amounts.

2. Switching investment options and/or changing your pension payment drawdown order (continued)

Changing your pension payment drawdown order only

- ☐ Please change my pension payment drawdown order to match the same ratio as my investment mix at the time of payment.
(Do not complete any of the columns.)
- ☐ Please change my pension payment drawdown order to what I specify below marked with the numbers 1 to 9 in the payment order column. For example, payments will be made first from the option marked '1' until the funds in that option are exhausted, then from the option marked '2' and so on. (Complete the 'payment order number' column only.)

Strategy


Investment option	Code	Switch from (dollar (\$) or percentage (%))	Switch to (dollar (\$) or percentage (%))	Payment order number
Aggressive				
Australian Share 6	AS	\$ / %	\$ / %	
International Share 4	JP	\$ / %	\$ / %	
Growth				
High Growth 2	AG	\$ / %	\$ / %	
Moderate				
Growth 2	Q3	\$ / %	\$ / %	
Conservative				
Balanced 2	AB	\$ / %	\$ / %	
Conservative 3	BU	\$ / %	\$ / %	
Defensive				
Conservative 4	JE	\$ / %	\$ / %	
Conservative 2 (only for members who joined before 1 July 2000)	F3	\$ / %	\$ / %	
Savings	U3	\$ / %	\$ / %	
	Total	(A) \$ / %	(B) \$ / %	
			100%	

3. Declaration and acknowledgement

By signing this form I declare as follows:

- I declare that the information provided on this form is correct.
- I request that your records be updated to reflect the changes indicated.

Member's signature



Date

DDMMYYYY

Where to send this form

This form must be mailed to:

Resolution Life
Locked Bag 5075
Parramatta NSW 2124

Contact phone number

133 731
between 9 am and 5 pm (AEST/AEDT), Monday to Friday,
excluding public holidays.

What you need to know

Equity Trustees Superannuation Limited ABN 50 055 641 757, AFSL No. 229757, RSE Licence No. L0001458 (Trustee) as trustee of the Super Retirement Fund ABN 40 328 908 469 (Fund) is the issuer of PensionSelect. Resolution Life Australasia Limited ABN 84 079 300 379 (Resolution Life) is the administrator of the Fund on behalf of the Trustee. The information contained in this document is factual information only. It does not contain any financial product advice or make any recommendations about a financial product or service being right for you. Resolution Life can be contacted via resolutionlife.com.au/contact-us or by calling 133 731.