

Change of details



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

Given name(s)

Surname

Residential address

Suburb

State

Postcode

Country

Postal address

Suburb

State

Postcode

Country

Mobile number

Alternate phone number

Email address

2. Change of name (new name¹)

New name¹

Title

Given name(s)

Surname

Old signature

New signature

3. Change of address and contact details

New postal address

Suburb

State

Postcode

Country

New residential address

Suburb

State

Postcode

Country

Mobile number

Alternate phone number

Email address

¹ Please attach evidence i.e. certified copy of deed poll, marriage certificate, etc.

4. Nomination of beneficiary (non-binding)

Do not complete this section if you have a reversionary beneficiary (binding nomination of beneficiaries) in place. This information is available on your Annual Statement or simply call us on the number **shown at the beginning of the form** between 9 am and 5 pm (AEST/AEDT), Monday to Friday, excluding public holidays.

Please cross the appropriate box, complete details and sign in **section 8**.

I wish to nominate a beneficiary on my account (please read the section 'Important information about beneficiary nominations' and then complete 'Indicate how you would like your benefit to be paid' below) **and/or**

I wish to revoke any previous beneficiary nomination made in respect of my account.

! Important information about beneficiary nominations

The Trustee has absolute discretion when distributing death benefits but will take your nomination into account. You may nominate anyone who is a 'dependant' as defined in the Trust Deed and/or your estate (i.e. your Legal Personal Representative). If the person whose name is specified below differs from a previous appointment made by you, the previous appointment(s) will be automatically revoked.

Who is a dependant?

Under the Fund Trust Deed, a dependant includes:

- a spouse, including a person (whether of the same or a different sex) with whom you are living on a genuine domestic basis in a relationship as a couple and a person with whom you are in a relationship registered under State or Territory law
- a child of any age (including an adopted child, step child or an ex-nuptial child, a child of your spouse and your child within the meaning of the Family Law Act 1975)
- a person with whom you have an interdependency relationship
- a person financially dependent on you.

Under superannuation law, an 'interdependency relationship' will exist where two people (whether or not related by family) meet all of the following conditions:

- they have a close personal relationship
- they live together
- one or each of them provides the other with financial support, and
- one or each of them provides the other with domestic support and personal care.

There may also be an interdependency relationship where two people have a close personal relationship and either or both of them suffer from a physical, intellectual or psychiatric disability. In this circumstance, there is no requirement for cohabitation or for provision of financial or domestic support.

Indicate how you would like your benefit to be paid

Lump sum nomination

| Full name | Relationship to you | Date of birth (dd/mm/yyyy) | Share of benefit |
|---|---------------------|----------------------------|------------------|
| | | / / | % |
| | | / / | % |
| | | / / | % |
| | | / / | % |
| My estate (i.e. Legal Personal Representative) | | | % |
| Total amount | | | 100% |

Pension nomination (a pension cannot be paid to your Legal Personal Representative)

| Full name | Relationship to you (spouse, child, interdependant, financial dependant) | Date of birth (dd/mm/yyyy) | Share of benefit |
|-----------|--|----------------------------|------------------|
| | | / / | 100% |

Although children generally qualify as dependants, a child aged 18 or over can only receive a pension if the child is financially dependent on you at your death and under age 25, or suffers from certain disabilities. Where a child aged 18 or over receives a pension, unless the child suffers from a relevant disability, the pension must be cashed as a lump sum when the child turns 25.

! **Please note:** Upon notification of your death, we will move your whole account balance to the Savings investment option. Your benefit will remain in this investment option until such time as the Trustee makes a decision as to who will receive your benefits.

5. Gross pension amount per annum/indexation rate

Please alter my pension payment as follows. Please cross the appropriate box.

Minimum pension

or

Specified amount

per annum

or per payment

\$

\$

Optional Annual Indexation Rate
(0–5%) whole numbers only

(max 5%)

Please note: If you are unsure of the minimum pension payment rate, please refer to <https://www.ato.gov.au/Rates/Key-superannuation-rates-and-thresholds/?page=9> for guidance.

6. Payment frequency

Please alter the frequency of my pension payments to:
(If a change prevents payment of minimum annual income an additional 'special' payment may be required)

Fortnightly > Please nominate day of payment

M T W T F

Monthly

Quarterly

Half yearly

Yearly

7. Payment instructions

(Please complete all details of your nominated Australian bank, building society or credit union account.)

Account name

BSB number

Account number

8. Declaration and acknowledgement

By signing this request 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

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 is part of the Resolution Life Group and can be contacted via resolutionlife.com.au/contact-us or by calling 133 731.