

Change of member details

Please print clearly in black ink.

You can use this form to update our records of your home address and other personal details. Please record your current details (as held at First State Super) in **Section 1** and your new details (for those items that have changed) in **Section 2**.

1. Your current First State Super personal details (as held at First State Super - please complete all fields)

Member number	Title (Mr Mrs Ms Miss Dr)	Male	Female	Birth date	
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	
Family name					
<input type="text"/>					
Given name/s					
<input type="text"/>					
Residential address					
<input type="text"/>					
Suburb				State	Postcode
<input type="text"/>				<input type="text"/>	<input type="text"/>
Postal address (if different from residential address)					
<input type="text"/>					
Suburb				State	Postcode
<input type="text"/>				<input type="text"/>	<input type="text"/>
Daytime contact telephone number			Mobile number		
<input type="text"/>			<input type="text"/>		
Email address					
<input type="text"/>					

2. Your new details

You must provide **certified documentary proof** of any **change of name**. See **Section 8** for more information.

Member number	Title (Mr Mrs Ms Miss Dr)	Male	Female	Birth date	
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	
Family name					
<input type="text"/>					
Given name/s					
<input type="text"/>					
Residential address					
<input type="text"/>					
Suburb				State	Postcode
<input type="text"/>				<input type="text"/>	<input type="text"/>
Postal address (if different from residential address)					
<input type="text"/>					
Suburb				State	Postcode
<input type="text"/>				<input type="text"/>	<input type="text"/>
Daytime contact telephone number			Mobile number		
<input type="text"/>			<input type="text"/>		
Email address					
<input type="text"/>					

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3. New investment strategy choice

Complete this section if you would like to change the investment strategy(ies) in which your income stream is currently invested.

Choose your new investment strategy(ies) by completing the table. To make a valid investment selection you must:

1. Specify the percentage that you wish to invest in each investment strategy (which must total 100%);
2. If you choose to invest in a **single asset class** investment strategy(ies) (marked # in the table) read the acknowledgement below and sign at the bottom of the Acknowledgement;
3. Read **Section 9 Member declaration** and sign at the bottom of the declaration.

Please note: these investment strategies are **single asset class** investment strategies. If you choose to invest in one or more of these strategies, **you must sign the Acknowledgement below.**

Important: if you do not fill this form out correctly, your investment choice will not be valid and your money will not be moved from the current strategy(ies). Check your confirmation letter to ensure that your money has been invested according to your wishes.

Investment strategy	Percentage you would like to invest in each strategy			
High Growth	X	X	X	%
Diversified	X	X	X	%
Balanced	X	X	X	%
Capital Guarded	X	X	X	%
Australian Equities#	X	X	X	%
International Equities#	X	X	X	%
Property#	X	X	X	%
Australian Fixed Interest#	X	X	X	%
International Fixed Interest#	X	X	X	%
Cash#	X	X	X	%
TOTAL	1	0	0	%

Acknowledgement

I understand that, generally speaking, I can reduce the overall risk of my investment in First State Super by investing (or diversifying) in one or more of the pre-mixed investment strategies (High Growth, Diversified, Balanced or Capital Guarded) or across a variety of single asset class investment strategies. Where I have chosen to invest in a single asset class investment strategy, I acknowledge having read the investment section of the PDS and I understand the risks associated with investing in single asset class investment strategies.

Name (Print in BLOCK LETTERS)

Signature

Date

4. Payment drawdown choice

Only complete this section if your account is invested in **two or more investment strategies** and you wish to nominate or change the order in which your payments are deducted from your investment strategies (eg. High Growth first, Diversified second, etc)

NOTE: If no selection is made, your income stream will be deducted from your investment strategies in proportion to the balance in each investment strategy at the time of withdrawal.

Investment strategy	Order in which you would like payments deducted (1, 2, 3...etc)
High Growth	X
Diversified	X
Balanced	X
Capital Guarded	X
Australian Equities	X
International Equities	X
Property	X
Australian Fixed Interest	X
International Fixed Interest	X
Cash	X

5. Change of payment frequency

Payment frequency

I would like to receive my income stream payments as indicated below (please ✓ tick one):

Fortnightly (every second Wednesday)

Monthly (on the 12th day of the month)

Quarterly (on the 12th day of September, December, March and June)

Half-yearly on the 12th day of June and December. Alternatively, you may nominate the two months you prefer (six months apart) and payments will be made on the 12th day of those two months.

Record your nominated months here: AND

OR

Yearly on the 12th day of June. Alternatively, you may nominate the month you prefer and payment will be made on the 12th day of that month.

Record your nominated month here:

6. Change the amount of income stream payment

Please (✓) tick one and provide the requested information.

Complete this section to change the amount of income you would like to receive. Complete **Column A** to nominate the amount of income you would like to receive from your **retirement income stream** or **Column B** to nominate the amount of income you would like to receive from your **transition to retirement income stream**.

Column A – Retirement income stream	Column B – Transition to retirement income stream
You must withdraw at least the minimum amount set by Federal legislation. The minimum amount that MUST be withdrawn is between 2% and 7% of your account balance, depending on your age (refer page 7 of the PDS).	Your income payment must be within the limits set by Federal legislation. The minimum amount that MUST be withdrawn is between 2% and 7% of your account balance, depending on your age (refer page 7 of the PDS). The maximum amount that MAY be withdrawn is 10% of your account balance on 1 July of the financial year in which the withdrawal is to be made (refer page 7 of the PDS).
Choose one of the following options: <input type="checkbox"/> I would like to withdraw the minimum annual payment OR <input type="checkbox"/> I would like to withdraw a specific annual amount which is above the minimum \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Choose one of the following options: <input type="checkbox"/> I would like to withdraw the minimum annual payment OR <input type="checkbox"/> I would like to withdraw the maximum annual payment OR <input type="checkbox"/> I would like to withdraw a specific annual amount which is between the minimum and maximum \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
The amount you nominate is a gross amount, ie. before any tax is deducted (if applicable).	The amount you nominate is a gross amount, ie. before any tax is deducted (if applicable).
You must nominate the amount you would like to receive each year. We will send you a letter in each year July advising the minimum amount you must withdraw and asking for your nomination.	You must nominate the amount you would like to receive each year. We will send you a letter in each year July advising the minimum amount you must withdraw and the maximum amount you may withdraw, and asking for your nomination.

7. Change the financial institution to which your payments are made

The bank account you nominate below will be credited with your income stream payments so please ensure the details are correct.

Note: to ensure the security of your benefits, First State Super requires:

- a copy of the part of your financial institution statement or passbook that contains your full name, address and your financial account details **AND**
- proof of identity (see **Section 8**)

Name(s) in which bank account is held (your name must be one of them)

Name of bank/financial institution

Name of branch

Bank/State/Branch (BSB) number

Account number

8. Proof of identity requirements

In order to protect your benefit entitlement and privacy, you must provide certain **certified*** documentation before the changes requested in this form can be processed.

If you have changed your **name**, we require a certified* copy of **one** of the following documents:

- Marriage certificate OR
- Deed poll document OR
- Change of name certificate.

If you have changed your **date of birth**, we require a certified* copy of **one** of the following documents:

- Birth certificate or birth card OR
- Passport OR
- Certificate of Australian citizenship OR
- Certificate of evidence of Australian residency OR
- Current RTA photo Driver's Licence.

If you have changed your **financial institution** details, we require a certified* copy of **one** of the documents listed in **Part A OR two** of the documents listed in **Part B**.

Complete either Part A or Part B

(Note: You should only provide a document from Part B if you are not able to provide a document from Part A)

Part A – Acceptable primary ID documents

Select **ONE** valid document from this section (please tick the document you are providing):

- Current Australian State/Territory driver's licence containing a photograph of the person
- Australian Passport (a passport that has expired within the preceding two years is acceptable)
- Card issued under a State of Territory for the purpose of providing a person's age containing a photograph of the person
- Foreign passport or similar travel document containing a photograph and the signature of the person*

OR

Part B – Acceptable secondary ID documents

Select **ONE** valid document from this section (please tick the document you are providing):

- Australian birth certificate
- Australian citizenship certificate
- National identity card issued by a foreign government containing a photograph of the person in whose name the card was issued*

AND

ONE valid document from this section (please tick the document you are providing):

- A document issued by the Commonwealth or a State or Territory within the preceding 12 months that records the provision of financial benefits to the individual and which contains the individual's name and residential address
- A document issued by the Australian Taxation Office within the preceding 12 months that records a debt payable by the individual to the Commonwealth (or by the Commonwealth to the individual) which contains the individual's name and residential address
- A document issued by a local government body or utilities provider within the preceding 3 months which records the provision of services to that address or to that person (the document must contain the individual's name and residential address)
- Foreign driver's licence that contains a photograph of the person in whose name it was issued and the individual's date of birth*
- Pension card issued by Centrelink
- Health card issued by Centrelink

* Documents not written in English must be accompanied by an English translation prepared by an accredited translator.

Certification of personal documents

The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping "certified true copy" followed by their signature, printed name, qualification (eg. Justice of the Peace, Australia Post employee, etc) and the date.

The following people can certify copies of the originals as true and correct copies:

- a Justice of the Peace
- a person enrolled on the roll of a State or Territory Supreme Court of the High Court of Australia as a legal practitioner
- an Australian consular officer or an Australian diplomatic officer
- a judge of a court
- a magistrate
- a registrar or deputy registrar of a court
- a Chief Executive Officer of a Commonwealth court
- a permanent employee of Australia Post with five or more years of continuous service
- a finance company officer with five or more years of continuous service (with one or more finance companies)
- an officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having five or more years continuous service with one or more licensees
- a notary public officer
- a police officer.

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