

How to complete the Change of Member Details form

1. Existing Member details

Complete this section in full for all changes. Please don't use initials. Your full name and date of birth will help us to identify your account.

2. Preferred Beneficiary/ies

Complete this section to change your nominated beneficiary/ies. To make sure that your nomination of preferred beneficiary/ies is valid, please read the following information.

Who can I nominate?

Under superannuation law and subject to the Trust Deed of the Plan, superannuation benefits payable in the event of your death may, in the first instance, be paid to your dependants, or to your legal personal representative. If you do not have a dependant or legal personal representative, the Trustee may pay the benefit to an individual, subject to the provision of the Trust Deed of the Plan.

The meaning of 'dependant' is detailed on page 17 of the PDS

- your spouse (including de facto);
- your children of any age (including step, adopted or ex-nuptial); or
- any other person who is or was wholly or partially financially dependent on you.

Who decides?

Under the Trust Deed, the Trustee alone is responsible for deciding to whom, and in what proportion, your death benefit should be paid. In making this decision however, the Trustee will naturally take into account your nomination of preferred beneficiary/ies.

For your nomination to be effective, it is important that you keep it up to date, particularly if your family or marital circumstances change.

3. Variation to Insurance Cover

Complete this section if you want to apply to increase your Death and/or Death & TPD cover or apply for Income Protection Cover.

4. Variation to Pension Payment Amount

Complete this section if you wish to change the amount of pension payment you wish to receive.

5. Variation to Payment Instructions

Complete this section if you wish to change the bank account your pension payments are paid into.

7. Declaration

You must sign and date the Declaration before returning this form.