

## Request to vary your Pension Payment Details

You can use this form to:

- change the amount or frequency of your pension (not applicable for lifetime pensioners)
- change your bank account details
- change your name or address details
- change your preservation status (transition to retirement pension only).

### If you need help

For assistance call ElectricSuper on 1300 307 844.

### Step 1 – Complete your personal details

Please print in black or blue pen,  
in uppercase, one character per box.



Title Mr Mrs Ms Other  Date of birth  /  /

Given names

Surname

Residential address **(must be provided)**

Suburb

State

Postcode

Postal address (if different from above)

Suburb

State

Postcode

Daytime telephone

Mobile

E-mail

Membership number

Pension Type **(select an option)** ☒

Retirement Income Stream (account-based pension)

Transition to Retirement Income Pension

Lifetime pension (former members of Division 3)

Issued by Electricity Industry Superannuation Board as Trustee of Electricity Industry Superannuation Scheme ABN 57 923 283 236.  
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## Step 2 – Change the amount/ frequency of your pension (not applicable to lifetime pensions)

### Please change my regular pension (before tax) payment as follows :-

I wish to receive my pension as follows (tick one box only ☒)

Minimum amount permitted

Maximum amount permitted (Only applicable for Transition to Retirement Pensions)

Nominated amount of \$  <sup>(\*)</sup> per annum (before tax)

\* For Transition to Retirement Pensions, the amount must be between the minimum and the maximum permitted

\* For Retirement Income Streams, the amounts must be at least the minimum permitted

I wish to receive my pension as follows (tick one box only ☒)

#### Change my Annual Pension Amount for the remainder of the financial year

The nominated annual pension amount will apply from the time my form has been received and processed.

#### Change my Annual Pension Amount for the complete financial year

This nominated annual pension amount will be the total amount paid for the current financial year. Payments you have already received this financial year will be taken into consideration in calculating your pension payments for the rest of the financial year.

I would like my pension to be paid (Select one option only ☒)

Fortnightly

Monthly

Quarterly\*

Half-Yearly\*

Yearly\*

\* For quarterly, half-yearly and yearly payments, please nominate the first month in which your payment is to commence:

m  m /  y  y  y  y

## Step 3 – Change your bank account details

### Bank Account Details

Please pay my pension to my new nominated account as follows:-

#### Name of Institution

#### BSB

 - 

#### Account Number

#### Account Name\*

(\* the account must be held in your name, or a joint account where you are one of the joint account holders.)

☐ I have attached a certified copy of my identification document (see below)



## Step 4 – Advise details of new name

☐ Insert new surname

☐ Insert new given names (if changed)

Select new Title (if changed)  
Mr      Mrs      Ms      Other

☐ I have attached a certified copy of my Marriage Certificate, Deed Poll or change of name certificate from Births, Deaths and Marriages Registration office to support my name change.

## Step 5 – Advise details of new address

☐ **Postal address** – attach a certified copy of a recent bill, mail item or driver's licence that displays your new postal address.

New postal address

Suburb  State  Postcode

Daytime Telephone  Mobile

E-mail

## Step 6 – Advise change to preservation status

*To be completed by  
Transition to Retirement  
Pensioners only.*

Your transition to retirement benefit is subject to tax on the earnings of your investments. When a condition of release has been met, these benefits will move into a tax free environment. Once a Condition of Release mentioned below is advised to the trustee, your benefit will be transferred to the equivalent tax free investment options. If you wish to change your investment options please go to **www.electricsuper.com.au** and complete the Investment switch form. Once in Retirement Phase the balance will be assessed against the Transfer Balance cap. For further information on this cap please refer to [www.ato.gov.au/super](http://www.ato.gov.au/super), or speak to your financial adviser.

### **Complete this section if your circumstances that affect the Preservation status of your Pension have changed.**

The preserved portion of your pension cannot be released to unpreserved status until one of the following conditions have been met:

- You are at least 60 years of age and have ceased employment since attaining age 60;

OR

- You are between 55 and 60 years old, have ceased employment and have permanently retired from the workforce.

Permanently retired is defined as never being gainfully employed again for more than 10 hours per week. Gainful employment means employed or self-employed for gain or reward in any business, trade, profession, calling, occupation or employment. If you are eligible, please complete one of the following declarations and **attach proof of age** to allow your benefit payment to be processed (e.g. certified photocopy of your driver's licence, passport or birth certificate).

**(select an option ✓)**

Yes, I am at least 60 years of age and I have ceased employment since attaining age 60.

Yes, I am at least 55 years of age, have ceased employment and intend to permanently retire from the workforce.

Once you attain age 65 these investments will automatically transfer to the tax free investments and will count towards your transfer Balance Cap. For further information on this cap please refer to [www.ato.gov.au/super](http://www.ato.gov.au/super), or speak to your financial adviser.

## Step 7 – Providing proof of your identity

**Should you need to provide certified proof of identity**, the easiest way to do this is as follows:


- photocopy both sides of your current drivers licence or passport
- take the photocopies of your ID and the original of the partly completed statutory declaration to Australia Post\* or your local Police station\*\*
- ask them to certify your ID.

\* to be able to certify your documents, the Australia Post employee must be a permanent employee of the Australian Postal Corporation

with 2 or more years of continuous service in an office supplying postal services to the public. Australia Post will charge a small fee for each photocopy you need to get certified.

\*\*a police officer, sheriff or sheriff's officer can certify your ID.

The person certifying your ID documents will include the following details on the copy:

	←	A clear copy of the document that identifies you (i.e. your driver's licence (front and back) or passport)
	Certified true copy ←	Write or stamp 'certified true copy' of the original document
	<i>J. Sample</i> ←	The authorised person's signature
	Mr John Sample ←	Full name, qualification and registration number (if applicable) of the authorised person
	Justice of Peace ←	Date of certification (within 12 months of receipt)
	Registration No.123456789	
	Date: 01/02/2015	

Alternatively, you can refer to the Completing Proof of Identity fact sheet on the fund's website at [www.electricsuper.com.au](http://www.electricsuper.com.au) for a list of other people who can certify your ID document(s) and witness your statutory declaration.

### If you don't have a driver's license or passport

You will need to provide a certified copy of one document from each of the following groups:

- Birth certificate or birth extract<sup>1</sup>
- Citizenship certificate issued by the Commonwealth
- Pension card issued by the Department of Human Services (Centrelink) that entitles the person to financial benefits

AND

- Letter from the Department of Human Services (Centrelink) or other Government body in the last 12 months regarding a Government assistance payment
- Tax Office Notice of Assessment issued in the last 12 months
- Rates notice from local council issued in the last 3 months
- Electricity, gas or water bill issued in the last 3 months
- Landline phone bill issued in the last 3 months (mobile phone bills will not be accepted)

#### <sup>1</sup> Translation

If your identification is written in a language other than English, the identification must be accompanied by an English translation prepared by a translator accredited by the National Accreditation Authority for Translators and Interpreters Ltd. (NAATI) at the level of Professional Translator or higher (or an equivalent accreditation), to translate from a language other than English into English.



## Your Privacy

ElectricSuper is administered by us along with our service provider, Mercer Outsourcing (Australia) Pty Ltd. We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information about the other products and services offered by us and our related companies. If you do not wish to receive marketing material, please contact us on 1300 307 844.

Our Privacy Policies are available to view at [www.electricsuper.com.au](http://www.electricsuper.com.au) or you can obtain a copy by contacting us on 1300 307 844.

If you do not provide the personal information requested, we may not be able to manage your superannuation.

We may sometimes collect information about you from third parties such as your employer, a previous super fund, your financial adviser, our related entities and publicly available sources.

We may disclose your information to various organisations in order to manage your super, including your employer, our professional advisors, insurers, our related companies which provide services or products relevant to the provision of your super, any relevant government authority that requires your personal information to be disclosed, and our other service providers used to assist with managing your super.

In managing your super your personal information will be disclosed to service providers in another country, most likely to Mercer's processing centre in India. Our Privacy Policies list all other relevant offshore locations.

Our Privacy Policies set out in more detail how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact us on 1300 307 844 or write to our Privacy Officer, Level 7, 70 Pirie Street, ADELAIDE SA 5000.

## Step 5 – Sign the form

By signing this form:

- I have read and understood this form
- I understand that under Tax Office regulations, I must keep a copy of this form for five (5) years from the date completed
- I understand and consent to my information being collected, disclosed and used in the manner set out in this form.
- I understand that my personal details cannot be updated unless the necessary documentation is provided.
- I authorise you to make the changes noted on this form in respect to the information provided.

Signature

X

Date

/ /

## Step 6 – Return your form

Please return your completed form (and any required ID) as follows:

- if certified ID documents are required - by post **only** to **ElectricSuper, GPO Box 4303, Melbourne VIC 3001**
- if certified ID documents are **not** required - by post to the above address, **or** by email to **[inquiries@electricsuper.com.au](mailto:inquiries@electricsuper.com.au)**

