



**FuturePlus
Super**

Account-Based Pension Plan

Application for Membership

Please complete in capital letters and in BLACK INK only

This form is to be completed if you wish to join the FuturePlus Super Account-Based Pension Plan.

You should read 'Important Notes' and refer to the Product Disclosure Statement (available from Member Services) before completing this form.

1. Your details

Member no.	<input type="text"/>	Date of birth (dd/mm/yyyy)	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>
Title	<input type="text"/> (e.g. Mr/Mrs/Ms/Miss/Dr)						
Family name	<input type="text"/>						
Given name(s)	<input type="text"/>						
Contact Details (postal address, telephone, email)							
No./Street/PO Box	<input type="text"/>						
Suburb/Town/City	<input type="text"/>						
State/Territory	<input type="text"/>	Postcode	<input type="text"/>	Country (if outside Australia)	<input type="text"/>		
Phone: Home no. (inc. STD/ISD)	<input type="text"/>			Business no. (inc. STD/ISD)	<input type="text"/>		
Mobile no.	<input type="text"/>			Fax no. (inc. STD/ISD)	<input type="text"/>		
E-mail address	<input type="text"/>						

Residential Address

Same as Postal Address above

Different from Postal Address above – you MUST complete below

No./Street	<input type="text"/>						
Suburb/Town/City	<input type="text"/>						
State/Territory	<input type="text"/>	Postcode	<input type="text"/>	Country (if outside Australia)	<input type="text"/>		

2. Investment instructions

Please select ONE of the following:

Please rollover the amount specified below from my FuturePlus Super account*:

Amount to be rolled over \$

I will be rolling over my Superannuation Lump Sum Payment as follows:

Provider Amount \$

Cheque should be made payable to the "FuturePlus Super Pension Plan"

* You will need to complete a FuturePlus Super "Application for Payment" form



3. Investment program

Please indicate your preference by investment strategy:

(If you don't indicate a strategy, your account will be invested in the Cash Option)

High Growth	Diversified	Balanced	Capital Guarded	Cash
<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %

OR indicate your preference in the Member choice program

Aust. Equities	Int. Equities	Listed Property	Aust. Fixed Income	Int. Fixed Income	Cash
<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %

4. Pension payments

Please commence my pension account: As soon as possible OR Commencement Date

If you invest between 1 June and 30 June, by selecting this box, you can defer your payments until next financial year. Please indicate your preferred payment option for the following financial year below.

Payment frequency (select one)

Monthly Quarterly Half-yearly Annually With first payment to commence in month of

Amount required each year (select one)

- Minimum pension income
- Specific pension income \$
- Maximum pension income (only relevant to Transition to Retirement Pensions – see 'Important Notes')

If 'Maximum pension income' is selected:

- Pro-rata of annual pension over the remainder of the financial year (reduced)
- Full annual pension to be paid in remaining months (not reduced)

5. Payment instructions

Please pay my pension directly to the Bank, Credit Union or Building Society account shown below:

Name of financial institution	<input type="text"/>									
Branch	<input type="text"/>									
Account name	<input type="text"/>									
Account number	<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"/>
	Branch (BSB) no.			<input type="text"/>	-	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

6. Preservation declaration

Please tick ONE of the following options below:

- I am using Unrestricted Non-Preserved funds
- I am at least 55 and retired, and do not intend to seek gainful employment for more than 10 hours per week in the future.
- I am at least 60 and have ceased employment since turning that age.
- I am 65 or older.
- I am permanently incapacitated and have previously provided 2 incapacity certificates to that effect.
- I have reached my preservation age and wish to commence a transition to retirement Account-Based Pension. I understand that by making this election, I will be unable to make any cash withdrawals until a full condition of release has been met.

Please read 'Important Notes' for further detail.



7. Applicant authority

Complete this section if you have had financial advice from a Chifley financial planner.

I hereby authorise my financial planner

who can be contacted on (02) 9273 0000, to provide any further instructions or clarification in respect to the payment of my benefit.

8. Applicant declaration

I declare that:

- I understand that Chifley Financial Services Limited (ABN 75 053 704 706) (the "Trustee") can provide me with information but cannot give me investment advice and the Product Disclosure Statement and Supplementary Product Disclosure Statement are a general guide and does not constitute investment advice.
- I understand that the Trustee is not responsible for my choice of investment strategy.
- I have fully read this form and confirm receiving and reading the relevant PDS. The information completed is true and correct.

Signed

Date (dd/mm/yyyy)

DO NOT FAX OR EMAIL THIS FORM AS YOUR ORIGINAL AUTHORISATION IS REQUIRED

What to do next

Please ensure that:

- you have completed Section 6 Preservation declaration;
- you have signed and dated Section 8 Applicant declaration;
- you have also completed a Tax File Number Declaration form if you are under age 60.

Where to send this form/enquiries

FuturePlus Super Account-Based Pension Plan
PO Box N180
GROSVENOR PLACE NSW 1220

Phone: (02) 9273 0000 or 1800 800 002
(8.30 am – 5.00 pm Mon – Fri)
website: www.futureplussuper.com.au



IMPORTANT NOTES

You should read the Product Disclosure Statement (PDS) before completing this form. The PDS is available from Member Services and the Fund's website.

MINIMUM INVESTMENT

The minimum investment is \$25,000.

MAXIMUM PENSION INCOME

If you have reached your preservation age and are still working but have elected to take a non-commutable pension under transition to retirement, then a maximum pension limit of 10% of your total account will be allowed to be taken as a pension each year.

For members who are not taking a pension under transition to retirement, there is no maximum pension amount applicable.

INVESTMENT OPTION

Unless a valid choice of investment strategy is made in section 3, your account will be invested in the Cash Plus option. Please contact Member Services for details.

PENSION PAYMENTS

Pension payments will be automatically deducted from your account in the same proportion(s) as your elected investment strategy(ies).

PRESERVATION RULES

Account-Based pensions can only be commenced with unrestricted non-preserved monies (unless a non-commutable election is made). Commonwealth provisions generally require part of your superannuation benefit to be preserved (retained in the superannuation system) until you:

- cease employment from age 60, OR
- retire permanently from the workforce on or after your preservation age (between 55 and 60); OR
- you reach age 65.

Your preserved component is also payable immediately if you suffer permanent incapacity or death.

TRANSITION TO RETIREMENT

If you have reached your preservation age, you are able to elect for this account-based pension to be non-commutable. By doing so, you will not be able to make a cash withdrawal (except in a limited number of circumstances), until you have met a full condition of release (please refer to the Preservation Rules for more details). You are however, able to roll back into the accumulation phase or rollover to another transition to retirement income stream at any time.

FEES AND CHARGES

Are as set out in Product Disclosure Statement available from Member Services.

PROTECTING YOUR PRIVACY

Some of the personal information you are requested to provide is required to establish and maintain your membership in FuturePlus Super while other information is required under Australia's Anti-Money Laundering and Counter-Terrorism Financing laws.

The Trustee is fully committed to comply with the National Privacy Principles in the way in which your personal information is stored and used. Full details of how this is achieved are contained in the Trustee's Privacy Policy, which is available from Member Services or the website at www.futureplussuper.com.au.

TRUSTEE INFORMATION

Please note that the information contained in this document is of a general nature only and does not constitute personal advice as it does not take into account your personal objectives, financial situation or needs. Any advice in this document is provided by Chifley Financial Services Limited (ABN 75 053 704 706), as an Australian Financial Services Licensee (AFSL 231148). Chifley Financial Services Limited is an APRA Registrable Superannuation Entity Licensee and the trustee of FuturePlus Super (ABN 76 829 356 693). Chifley Financial Services Limited is co-owned by Energy Industries Superannuation Scheme Pty Limited, Unions NSW, The Australian Workers Union National Office and The Australian Workers Union Greater New South Wales Branch.

Members should not rely solely on this information and should consider their own personal objectives, financial situation and needs before acting on this information. Prior to making any investment decision you should obtain and consider the relevant Product Disclosure Statement (PDS) or other offer document and seek professional investment advice.

