

Account-Based Pension Plan

Change of Membership Details

Please complete in capital letters and in BLACK INK only

This form is to be completed by Members wishing to change their membership details, ie, name, contact details or date of birth. The personal information provided will be used solely for the purpose of correcting your membership details. You have the right to check those details at any time and have them corrected if necessary.

1. Your existing details - as currently recorded by us

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

2. Your new details

<input type="checkbox"/>	Change of name. Please provide official documents, e.g. certified copy of Deed Poll or Marriage Certificate. This document must be certified by a Justice of the Peace (JP).							
New family name								
New given name(s)								
<input type="checkbox"/>	Change of postal address / phone numbers / e-mail address							
No./Street/PO Box								
Suburb/Town/City								
State/Territory		Postcode		Country (if outside Australia)				
Phone: Home no. (inc. STD/ISD)				Business no. (inc. STD/ISD)				
Mobile no.				Fax no. (inc. STD/ISD)				
E-mail address								



2. Your new details (cont'd)

Change of residential address (if different from postal address)

Street/PO Box no.

Suburb/Town/City

State/Territory Postcode Country (if outside Australia)

Change of recorded birth date. Please provide official documents, e.g. certified copy of birth certificate, current driver's licence, passports, etc. This document must be certified by a Justice of the Peace (JP) (See "Important Notes").

Correct date of birth (dd/mm/yyyy) / /

3. Your new pension payment details

Please change my pension payment: As soon as possible **OR** Effective from

Payment frequency (select one)

Monthly Quarterly Half-yearly Annually

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)

Please Note: Request to change your pension payments must be received at least five business days before the due date of the next pension payment or your request may not be completed before the next payment has been processed.

4. Your new bank account details

Please change my bank account: As soon as possible **OR** Effective from

Name of financial institution

Branch

Account name

Account number Branch (BSB) no. -

Please Note: The account must be in your name or a joint account of which you are one of the account holders.

5. Applicant authority

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

I hereby authorise my financial planner

who can be contacted on (02) 8234 6000, to provide any further instructions or clarification in respect to this form.

6. Member declaration

I have fully read this form and 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



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.

CERTIFIED DOCUMENTS

A 'certified copy' is a photocopy of the original document, which has been sighted and signed by a Justice of the Peace (JP) or solicitor as a true representation of the original.

Change of name

Please provide a certified copy of one (1) of the following:

- deed poll; or
- marriage certificate; or
- decree absolute

Change of recorded birth date

Please provide a certified copy of one (1) of the following:

- birth certificate; or
- current driver's licence; or
- current passport; or
- certificate of Australian citizenship (if it contains your date of birth)

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.

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 (ABN 72 077 947 285), Unions NSW, Australian Workers Union (ABN 28 853 022 982 trading as the Australian Workers Union National Office) and the Australian Workers Union (ABN 70 662 384 762 trading as The Australian Workers Union Greater New South Wales Branch).

You should not rely solely on this information and you should consider your 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.

Where to send this form/enquiries

FuturePlus Super

PO Box N835

GROSVENOR PLACE NSW 1220

website: www.futureplussuper.com.au

Phone: 1800 067 059

(8.30 am – 5.00 pm Mon – Fri)

enquiries: info@futureplussuper.com.au

