

Change your pension payments

1800 005 166
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GPO Box 1547, Hobart TAS 7001

Use this form to change your pension amount, payment frequency or bank details.

If you have a Transition Pension or Control Pension, complete Sections 1, 2, 4, 5 and 6.

If you have a Term Allocated Pension, complete Sections 1, 3, 4, 5, and 6.

If you have a Managed Pension, you can't change your pension amount or payment frequency.

Important information

If you're changing your pension amount or frequency, we may need to adjust your payment amounts or pay you an extra payment to meet the minimum requirements for the financial year. A maximum payment also applies to Transition Pensions and Term Allocated Pensions.

We need to receive your request at least three business days before the next scheduled payment date.

We'll generally update your pension payments within three business days of receiving your request.

Once your change is processed, your current pension payments will cease. You won't receive any payments until your new nominated payment date.

Section 1 Your personal details

Member number

Account number

Date of birth (DD MM YYYY)

Last name

Given name/s

Residential address

Suburb/Town/City

State

Postcode

Section 2 Change your pension amount – Control Pension and Transition Pension only

Complete this section if you want to change the payment amount for your Control Pension or Transition Pension. You can change your payment frequency in section 4.

How much do you want to receive? Select one option.

the minimum amount required.

an amount of \$ each payment, before tax.

We may adjust the amount to satisfy the minimum and maximum requirements. Tax may be payable if you're under 60.

the maximum amount (for Transition Pensions only).

The maximum pension amount you can receive from your Transition Pension is 10% of your 1 July account balance.



Section 3
Change your pension amount – Term Allocated Pensions only

Complete this section if you want to change your Term Allocated Pension payment. You can change your payment frequency in section 4.

How much do you want to receive? Select one option.

- the minimum – 90% of your annual pension amount.
- the maximum – 110% of your annual pension amount.
- an amount of \$ each year, before tax.

This amount must be between 90% and 110% of your annual pension amount. We may adjust the amount to fit within this range. Tax may be payable if you're under 60.

Section 4
Your new payment frequency

I want to receive my payments: Select one option.

- fortnightly, paid every second Thursday.
- monthly, paid on the 20th of each month.
- quarterly, paid on the 20th of every third month.

Month of next payment:

- twice-yearly, paid on the 20th of every sixth month.

Month of next payment:

- yearly, paid on the 20th of your chosen month:

Section 5
Your bank details

- I don't want to change my bank account details

OR

- My new bank account details are: Provide details below.

Account holder's full name – eg Jane Smith. The account must be held solely or jointly in your name. Payments can't be made to business accounts or third parties.

BSB number

Account number



Section 6 Provide proof of identity

Only complete this section if you're updating your bank account details.

Please verify your identity by choosing option 1 or 2.

Option 1 – I want to use electronic verification

By completing this section, I authorise Spirit Super to use my details held for the purpose of confirming my identity. I understand that my details will be checked with the relevant official record holder through the use of third party systems.

Important: Make sure that the details you provide below exactly match your documents. If the details vary, we won't be able to verify your identity electronically.

Provide details of any TWO of the following:

1. Australian driver's licence

Full name as appears on my driver's licence

My Australian driver's licence number

State of issue

Expiry date (DD MM YYYY)

Card issue number

2. Medicare card

Full name as appears on my Medicare card

My Medicare number

Valid to (MM YYYY)

Colour of card

Green

Yellow

Blue

Your reference number on this card is

3. Australian passport

Full name as appears on my passport

My Australian passport number

Option 2 – I want to use paper-based verification

I've provided certified proof of identity with this form. Read our *Guide to providing proof of ID* fact sheet for more details.

I authorise Spirit Super to use my personal details for the purpose of confirming my identity if the paper copies of my certified identification documents are incorrectly certified, scanned or unable to be read. I understand that my details will be checked with the relevant official record holder through the use of third party systems.



Section 7
Member
declaration

By signing this form I'm making the following statements:

- To the best of my knowledge, the information I've provided is true and correct.
- I understand that Spirit Super will update my pension payments within three business days of receiving my completed request, and that I won't receive payments until my new nominated payment date.
- I understand that if I have a pension payment due within the next three business days, then I won't receive that payment. I'll receive the next payment on my new nominated payment date.
- I understand that Spirit Super may adjust my payment amounts, or pay me an extra amount, in order to meet the minimum and maximum requirements.
- I consent to the use of my personal information as outlined in Spirit Super's *Privacy policy* available at spiritsuper.com.au/privacy-policy or by calling us on **1800 005 166**.
- I request and consent to the payment of my benefits as described above, and authorise Spirit Super to determine the tax treatment of my benefit.

Your signature

Date (DD MM YYYY)

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Return the completed, signed and dated form to info@spiritsuper.com.au or Spirit Super, GPO Box 1547, Hobart TAS 7001.

