Pension Membership application form



Before you sign this application form, the Trustee is obliged to give you a full copy of the Product Disclosure Statement (PDS).

The PDS will help you to understand the product and decide if it is appropriate for your needs. The latest version of the PDS has a publication date of 8 December 2023. If the PDS is not attached to, or accompanying, this application form, please phone 1300 13 44 33 to obtain a copy. When you have completed and signed the form, please return it to: GPO Box 4303, Melbourne VIC 3001.

> STEP	1: YOUR [DETAI	LS														
*Title											*	'Date o	f birth				
Mr	Mrs	Ms	Miss	Dr	Other								/	,	/		
*Surname																	
*Given name	25																
*Residential	address																
*Suburb												*Stat	te		*Posto	code	
Contact tele	phone numh	per – Bu	siness hours			Cont	act telep	hone n	umber –	- After h	ours						
(,	,										
*Mobile						(,										
*Email addre	255																
Eman addre	.55																
* Indicates fie	elds that MU	SI be co	mpleted.														
> STEP	2: TAX FIL	LE NU	MBER (TF	N) NOTII	ICATION	I											
If you are ago						on Office	Employn	nent De	claratio	n/Tax Fi	ile Nur	nber N	otifica	tion fo	rm.		
Please call 1300 13 44 33 or your financial adviser to obtain one.																	
STEP 3: ELIGIBILITY TO ACCESS A PENSION																	
In order to be eligible to transfer your nominated superannuation amount (as specified in Step 4) to an REI Super pension, you must be an Australian Permanent Resident, New Zealand Citizen or Australian Citizen and meet one of the below conditions of release. I declare that I am an Australian Permanent Resident, New Zealand Citizen or Australian Citizen and meet the condition of release that I have selected below. Select a condition of release. If you are applying for a Transition to Retirement Pension, you are only eligible if you have reached your preservation age and have not permanently ceased gainful employment.					1	eached	l mv nre	servatio	nn age	(see n:	age 8 c	of the P	DS) h:	ave cea	sed		
					g	I reached my preservation age (see page 8 of the PDS), have ceased gainful employment and do not intend ever again to become											
					gainfully employed for 10 hours a week or more.												
					I am aged 60–64 and after reaching age 60 have ceased												
					an arrangement under which I was gainfully employed for at least 10 hours per week												
					I am aged 65 or over												
I have re	eached my n	reservat	tion age (see	page 8 of th	ne PDS) but	not		_			acitata	od (my	cupor	اد عاده	dy clas	cified	25
I have reached my preservation age (see page 8 of the PDS) but not age 65, have not permanently ceased paid full time or part time work of at least 10 hours per week (and intend to continue working until further notice) and am applying for a Transition to Retirement Pension.					I am permanently incapacitated (my super is already classified as 'unrestricted non-preserved')												
					Note: we may seek supporting evidence in respect of your selection.												









'Gainfully employed' means employed or self-employed for gain or reward in any business, trade, profession, vocation, calling, occupation or employment. If you are a temporary resident of Australia contact us on 1300 13 44 33.

Pension Membership application form cont...

SIEP 4: IKANSFEK INFORMA	HON							
Please provide details of the source of your contributions will be received in your accur								
Transfer from my existing REI Super a	ccount, Memb	pership no.						
My total REI Super account balan	ice OR							
	lee OK							
Amount to be transferred \$,	,						
Transfer from another super fund. Ple	ase complete	and return	the Rollover I	orm provi	ded with the	PDS.		
Note: if you transfer the total of your REI St accumulation account will be closed and a financial advice from an appropriately qua	ny insurance d	cover you ha	ave will cease.	Please en	sure your con	sider the impact		
> STEP 5: INVESTMENT CHOICE								
You can choose any one or more investmer invested in our Default Investment Strateg relation to your investment choice. The tot you don't make a selection, the Default Inv	nt options up t y. You should al of your choi	refer to the ices must a	How your REI dd up to 100%	Super Pen S for it to b	i sion is invest e a valid choid	ed section of the ce. If you choices	PDS for further de do not add up to 1	etails in
Growth	%	Cash			%	Global Property	/	%
Balanced	%	Australia	n Shares		%	Australian Prop	erty	%
Stable	%	Internation	onal Shares		%	Bonds	-	%
						TOTAL		100%
2. Choose your pension amount Please select one of the following options: Maximum Allowable Pension OR Minimum Allowable Pension OR 3. Choose the investment options fro If you have nominated more than one invepayment to be deducted from your chosen or we are unable to implement your nominated a specified order, starting with the Cash op	Pleas (Note \$ m which to o stment option investment o nation for any above in Step ition. If the Ca	aximum All se pay me the en must be be draw your n (see Step ! ptions. The reason, REI 5. If you're ash option h	he following g etween the Mi pension pay 5, Investment total of your Super will ded invested in the	ross amou nimum and , , rments Choice, ab choices mu duct your p e Default I	is only availab int before tax d, where applic ove), you can ust add to 100 pension paym nvestment St en your paym	(if any) at each p cable, Maximum A choose the propo % for it to be vali ents from your ac rategy, your pens ents will be made	ension payment d Illowable Pension a ortion of each pen d. If you do not m count balance in ion payments will e from the Balance	sion ake a choice, accordance I be made in ed option.
Growth	%	Cash			%	Global Property		%
Balanced	%	Australia			%	Australian Prop	erty	%
Stable	%	Internati	onal Shares		%	Bonds TOTAL		100%
4. Please pay my pension to the follow Note: you must nominate an account held Institution Branch address Suburb Account Name	_	-	onic Funds T	ransfer (E	FT)	State	Posto	code
BSB number	Account nu	mber						



> STEP 7: NOMINATION OF BENEFICIARIES

Non-Binding Nomination of Beneficiaries

To assist the Trustee in determining who should receive any lump sum payable from the Fund in the event of your death, you should complete this section. It is not binding on the Trustee, but your wishes will be deeply considered before any alternative decision is made. If you wish to make a Binding Death benefit Nomination for your Pension account please complete the binding death benefit nomination form available on our website at reisuper.com.au. If you wish to make a Reversionary Beneficiary nomination see the next page. You should only make one type of nomination for your account. See the PDS for information about what happens if you make more than one type of nomination for your account.

Please write below the name(s) of the dependant(s) that you want to receive your superannuation and insurance (if any) if you die. Don't forget to write down what percentage of your benefit you would like each dependant to be paid. The percentages must add up to 100%.

Alternatively you may nominate the legal personal representative(s) of your estate. Write their name(s) below and place 'legal personal representative' under Relationship to you. If you have not made a will, you should make one out preferably by visiting a qualified legal practitioner who can advise you.

You should update all nominations and your will as soon as your circumstances change, for example, as a result of your divorce, remarriage, separation from long-term partner or death of any nominated person.

A **dependant** is defined in superannuation law and includes your spouse (including de facto), your child (including step child, adopted child or ex-nuptial child) or other person financially dependent on you at the time of your death. For more information in relation to dependants, refer to **Definition of dependants** on page 29 of this PDS.

Who qualifies as your **legal personal representative(s)** is also defined in superannuation law but basically refers to the executor(s) of your will or the grantee(s) of probate of your will or the grantee(s) of what are called letters of administration of your estate (obtainable from court by appropriately `close' people to you but at some cost, should you die without having made a will).

If I die while a member of the Fund, I wish for my benefit to be paid to my dependant(s) and/or legal personal representative listed below. If you wish to nominate more than 4 beneficiaries (dependants and/or legal personal representatives) contact us.

1. Full name

Residential or if applicable, Business address			
Suburb		State	Postcode
Relationship to you	Date of birth		Proportion of benefit
			%
			70
2. Full name			
Residential or if applicable, Business address			
in a particular of it appricable, submitted			
Suburb		State	Postcode
Relationship to you	Date of birth		Proportion of benefit
			%
2 Full record			
3. Full name			
Desidential oxif applicable Dusiness address			
Residential or if applicable, Business address			
Cultural		C+-+-	D+
Suburb		State	Postcode
Relationship to you	Date of birth		Proportion of benefit

Continued over >



Pension Membership application form cont...

STEP 7: NOMINATION OF BENEFICIARIES CONT							
4. Full name							
Residential or if applicable, Business address							
Suburb	State Postcode						
Relationship to you	Date of birth Proportion of benefit						
	/ / %						
	TOTAL MUST ADD UP TO						
OR:							
Reversionary Beneficiary Nomination							
	to be paid after your death, subject to superannuation laws. See page 29 of PDS.)						
Note: You can only nominate one reversionary beneficiary to receive your Pedependant at the date of death. You cannot nominate a legal personal representation of the control of the contr							
1. Full name							
Relationship to you Dat	e of birth						
I have attached a certified copy of my driver's licence or passport OR I have attached certified copies of BOTH: Birth/Citizenship Certificate OR Centrelink Pension Card AND Centrelink payment letter, OR Commonwealth or State/Territory Government or local council notice, OR utility bill (<1 year old), with my name and address							
STEP 9: DECLARATION AND SIGNATURE							
Your signature below indicates that you have read, understood and agree to	the following statements:						
 I apply to become a member of REI Super Pension on the terms and conditions contained in the Trust Deed and Rules of the Fund. I understand that the Trust Deed and Rules can be inspected on request. I have received and read the information provided to me about the Fund, in particular, the Product Disclosure Statement and any SPDS. The choices I have indicated on this form will remain in force until I advise the Trustee otherwise, with the effective date of change being as advised by the Trustee. The information that I have supplied on this application form is true and correct at the date of signing, and I will notify the Trustee immediately if any of this information changes. I consent to the Fund providing me with information about benefits provided by third parties. (If you do not want information sent to you, please tick this box). 	 I acknowledge that the Trustee may use my email address and/or mobile phone number (if provided) to send me information, including member product disclosure documentation and marketing material digitally. This information may be sent by email with an attachment or may include a link to a website from where it can be downloaded. I also acknowledge that should I wish to receive all documentation by mail rather than email, I can update my preferences by logging into my account or by calling REI Super. I understand and consent to my information being collected, disclosed and used in the manner set out in this form. I understand that investment returns are not guaranteed, and the value of my investment in the Fund may rise or fall. I understand that fees and costs apply to each pension account I hold in the Fund and that these fees and costs are additional to any fees and costs applicable to any other account I hold in the Fund. I have read and understood the Privacy Policy which is available at reisuper.com.au/privacy-policy and I consent to my personal information being collected and used by REI Super in accordance with this policy. 						
*Signature							
*Signature	*Date						
X	/ /						

* Indicates fields that MUST be completed.