Pension Membership application form

REI Super

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 1 July 2026. 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: **admin@reisuper.com.au** or via post (details on last page).

Please print in black or blue pen, in CAPITAL LETTERS (UPPERCASE).

PART 1: YOUR DETAILS

Member number

☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Dr Other

Given names

Surname

Date of Birth (DD-MM-YYYY)

– –

Residential address

Suburb

State

Postcode

Postal address. If the same as your residential address, mark ✓ in this box. ☐

Suburb

State

Postcode

Mobile phone

Home phone

( )

Email

STEP 2: TAX FILE NUMBER (TFN) NOTIFICATION

If you are aged under 60 you need to complete an Australian Taxation Office Employment Declaration/Tax File Number Notification form. 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 age 60 and have not permanently ceased gainful employment.

☐ **I have reached age 60** 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 have reached age 60,** 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 on or after reaching age 60 have ceased an arrangement under which I was gainfully employed

☐ I am aged 65 or over

☐ I am permanently incapacitated (and 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.**

Issued by REI Superannuation Pty Ltd ABN 68 056 044 770, AFSL No. 240569, RSE L0000314,
MySuper unique identifier 76641658449129, as Trustee of REI Super ABN 76 641 658 449, RSE R1000412.

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STEP 4: TRANSFER INFORMATION

Please provide details of the source of your Account Based Pension investment. If further contributions will be received in your accumulation account in REI Super, it is a requirement that you retain $6,000 in your accumulation account when commencing your Transition to Retirement Pension.

☐ **Transfer from my existing REI Super account, Membership no.** ☐☐☐☐☐☐☐☐☐☐

☐ My total REI Super account balance **OR** ☐ All but $6,000 of my REI Super account balance **OR**

☐ Amount to be transferred $ ☐ , ☐☐☐ , ☐☐☐ . ☐☐

☐ **Transfer from another super fund. Please complete and return the Rollover Form provided with the PDS.**

Note: if you transfer the total of your REI Super accumulation account balance, or other accumulation account balance, to an REI Super Pension, your accumulation account will be closed and any insurance cover you have will cease. Please ensure your consider the impact of any transfer and obtain financial advice from an appropriately qualified adviser taking into account your personal circumstances.

STEP 5: INVESTMENT CHOICE

You can choose any one or more investment options up to a total of ten. If you do not make a valid investment choice, your account balance will be invested in our Default Investment Strategy for pension accounts. You should refer to the **How your REI Super Pension is invested** section of the PDS for further details in relation to the investment choices available to pension accounts (if you do not wish to be invested in the Default Investment Strategy). The total of your choices must add up to 100% for it to be a valid choice. If you choices do not add up to 100%, or if you don't make a selection, the Default Investment Strategy will apply to your entire super balance until further notice from you.

Growth Plus	%	**Cash**	%	**Global Property**	%
Growth	%	**Australian Shares**	%	**Australian Property**	%
Balanced	%	**International Shares**	%	**Bonds**	%
Stable	%			**TOTAL**	%

STEP 6: PENSION PAYMENT DETAILS

1. Choose your pension PAYMENT frequency

Please select one of the following options:

Date of the first pension payment: ☐☐ / ☐☐ / ☐☐☐☐

Choose frequency of payment: ☐ Monthly ☐ Quarterly ☐ Annually

2. Choose your pension amount

Please select one of the following options: (Note: the 'Maximum Allowable Pension' option is only available for Transition to Retirement Pensions).

☐ Maximum Allowable Pension **OR**

☐ Minimum Allowable Pension **OR**

☐ Please pay me the following gross amount before tax (if any) at each pension payment date: (Note: must be between the Minimum and, where applicable, Maximum Allowable Pension amounts)

$ ☐☐☐ , ☐☐☐ . ☐☐

If you nominate an amount, do you want your payment indexed from 1 July each year?

☐ No indexation ☐ Yes, by the Consumer Price index (CPI) ☐ Yes, by ☐☐☐ %

Note: The amount you list above must be within the minimum and maximum (if applicable) amounts permitted under law. For more information refer to the Pension Disclosure Statement at **reisuper.com.au/pension-pds**

3. Choose the investment options from which to draw your pension payments

If you have nominated more than one investment option (see Step 5, Investment Choice, above), you can choose the proportion of each pension payment to be deducted from your chosen investment options. The total of your choices must add to 100% for it to be valid. If you do not make a choice, or we are unable to implement your nomination for any reason, REI Super will deduct your pension payments from your account balance in accordance with the percentages you have nominated above in Step 5. If you're invested in the Default Investment Strategy, your pension payments will be made in a specified order, starting with the Cash option. If the Cash option has insufficient funds then your payments will be made from the Balanced option.

Growth Plus	%	**Cash**	%	**Global Property**	%
Growth	%	**Australian Shares**	%	**Australian Property**	%
Balanced	%	**International Shares**	%	**Bonds**	%
Stable	%			**TOTAL**	%

4. Please pay my pension to the following account by Electronic Funds Transfer (EFT)

Note: you must nominate an account held in your name.

Institution

Branch address

Suburb | State | Postcode

Account Name

BSB number ☐☐☐ – ☐☐☐ | Account number

Pension Membership application form continued

STEP 7: NOMINATION OF BENEFICIARIES

Non-Binding Nomination of Beneficiaries

To help the Trustee determine 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 (select one option only)

☐ Spouse ☐ Child ☐ Financial Dependant ☐ Interdependency Relationship

Proportion of payout

%

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2. Full name

Residential or if applicable, Business address

Suburb State Postcode

Relationship to you (select one option only)

☐ Spouse ☐ Child ☐ Financial Dependant ☐ Interdependency Relationship

Proportion of payout

%

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3. Full name

Residential or if applicable, Business address

Suburb State Postcode

Relationship to you (select one option only)

☐ Spouse ☐ Child ☐ Financial Dependant ☐ Interdependency Relationship

Proportion of payout

%

Continued over

Pension Membership application form continued

STEP 7: NOMINATION OF BENEFICIARIES CONTINUED

4. Full name

Residential or if applicable, Business address

Suburb State Postcode

Relationship to you (select one option only)

☐ Spouse ☐ Child ☐ Financial Dependant ☐ Interdependency Relationship

Proportion of payout %

AND/OR Legal Personal Representative (LPR) of your estate. %

TOTAL (must equal 100%): %

OR:

Reversionary Beneficiary Nomination

(A valid reversionary beneficiary nomination means your Pension will continue 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 Pension upon your death. Your nominated beneficiary must be an eligible dependant at the date of death. You cannot nominate a legal personal representative.

1. Full name

Relationship to you (select one option only)

☐ Spouse ☐ Child ☐ Financial Dependant ☐ Interdependency Relationship

Proportion of payout %

STEP 8: PROOF OF IDENTITY

We will verify your identity electronically. If we cannot verify your identity electronically, we may ask for certified copies of your identification documents. See the How to prove your identity guide under Publications and forms on **reisuper.com.au**.

☐ I have attached a copy of my driver's licence or passport **OR**

☐ I have attached 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 Supplementary Product Disclosure Statement.
- 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. I agree to REI Super using the information and document details provided above to verify my identity electronically using independent data sources via a third party.

*Signature

*Date / /

READY TO SEND US YOUR FORM?

When you have completed and signed the form, please return it to:

Email: admin@reisuper.com.au.

Post: (No stamp required) **REI Super, REPLY PAID 92304.**
NEWCASTLE NSW 2300

WE'RE HERE TO HELP

If you need any assistance with filling out this form, or have any questions about super, please feel free to call us on **1300 13 44 33**.