

Request to vary your Pension Payment

Please print in black or blue pen, in uppercase.

If you need help

For assistance, information on your benefit entitlements, or to access the Privacy Policy and your personal information call the Helpline on **1300 13 44 33**.

> PART 1: YOUR DETAILS

☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Dr Other		Member number	
Given names			
Surname		Date of Birth (DD-MM-YYYY)	
		- -	
Residential address			
Suburb		State	Postcode
Postal address. If the same as your residential address, mark X in this box. ☐			
Suburb		State	Postcode
Mobile phone		Home phone	
Email			
Pension Type. Tick only one box:			
☐ Allocated Pension ☐ Transition to Retirement Allocated Pension			

> PART 2: ATTACH PROOF OF IDENTITY

Name and date of birth changes – see the ‘Completing proof of identity’ fact sheet on the website www.reisuper.com.au.

Address changes – attach a copy of a recent bill, mail item or driver’s licence that displays your new residential or postal address.

If the required supporting documentation is not provided, the payment of your benefit will be delayed.



➤ PART 3: PROVIDE PAYMENT INSTRUCTIONS

ANNUAL PENSION AMOUNT.

Minimum annual pension amount permitted
 Maximum annual pension amount permitted (Only available for Transition to Retirement Allocated Pensions)
 Nominated annual pension amount of \$, , pa (gross of tax)(*)

☐ No indexation

☐ Yes, by the Consumer Price index (CPI)

☐ Yes, by %

* For Allocated Pensions, the amount must be at least the minimum amount permitted.

☐ **Change my Annual Pension Amount for the remainder of the financial year**
The nominated annual pension amount will apply from the time my form has been received and processed.

☐ **Change my Annual Pension Amount for the complete financial year**
The nominated annual pension amount will be the total amount paid for the current financial year.
Payments you have already received this financial year will be taken into consideration in calculating your pension payments for the rest of the financial year.

- ☐ Monthly
- ☐ Quarterly
- ☐ Annually

☐ Existing bank account **OR**

☐ New bank account (provide details below)

BSB - Account number

State Postcode

Request to vary your Pension Payment cont...

> PART 4: PROVIDING PROOF OF YOUR IDENTITY

Do you need to provide new certified proof of identity?

Please indicate **X** if one of the following applies. Please note that if the information provided below does not match our records, your payment will be delayed.

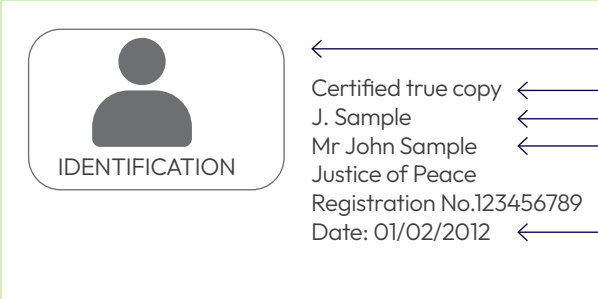
- ☐ You have not provided certified ID previously
- ☐ You have changed your name (either your first or last name) – see below (under Name Change) for the list of specific documents required.
- ☐ Your date of birth was incorrect on our records and has been updated
- ☐ You have changed your bank account details

If you have ticked one of the items above, you will need to provide new certified proof of identity.

The easiest way to do this is as follows:

- photocopy both sides of your current drivers licence or passport
 - take the photocopies of your ID and the original of the partly completed statutory declaration to Australia Post* or your local Police station**
 - ask them to certify your ID.
- * to be able to certify your documents, the Australia Post employee must be a permanent employee of the Australian Postal Corporation with 2 or more years of continuous service in an office supplying postal services to the public. Australia Post will charge a small fee for each photocopy you need to get certified.
- ** a police officer, sheriff or sheriff's officer can certify your ID.

The person certifying your ID documents will include the following details on the copy:



← A clear copy of the document that identifies you (i.e. your driver's licence (front and back) or passport)

Certified true copy ← Write or stamp 'certified true copy' of the original document

J. Sample ← The authorised person's signature

Mr John Sample ← Full name, qualification and registration number (if applicable) of the authorised person

Justice of Peace

Registration No.123456789

Date: 01/02/2012 ← Date of certification (within 12 months of receipt)

Alternatively, you can refer to the Completing Proof of Identity fact sheet on the fund's website at www.reisuper.com.au for a list of other people who can certify your ID document(s) and witness your statutory declaration.

If you don't have a driver's license or passport

You will need to provide a certified copy of one document from each of the following groups:

- Birth certificate or birth extract¹
- Citizenship certificate issued by the Commonwealth
- Pension card issued by the Department of Human Services (Centrelink) that entitles the person to financial benefits
- Aboriginal or Torres Strait Islander community identification card

- Letter from the Department of Human Services (Centrelink) or other Government body in the last 12 months regarding a Government assistance payment
- Tax Office Notice of Assessment issued in the last 12 months
- Rates notice from local council issued in the last 3 months
- Electricity, gas or water bill issued in the last 3 months
- Landline phone bill issued in the last 3 months (mobile phone bills will not be accepted)

*Alternative Identification and Verification processes available for customers experiencing short or long term barriers to accessing or providing standard identification — please contact us.

Name change

If you have changed your name, you must provide a certified copy of the relevant name change document¹, for example, a marriage certificate, deed poll, decree nisi/divorce order or change of name certificate issued by the Births Deaths and Marriages Registration office.

¹ Translation

If your identification is written in a language other than English, the identification must be accompanied by an English translation prepared by a translator accredited by the National Accreditation Authority for Translators and Interpreters Ltd. (NAATI) at the level of Professional Translator or higher (or an equivalent accreditation), to translate from a language other than English into English.

Request to vary your Pension Payment cont...

Your Privacy

The Fund is administered by us along with our service provider, SS&C Bluedoor Pty Limited (SS&C). We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information about the other products and services offered by us and our related companies.

If you do not wish to receive marketing material, please contact us on **1300 13 44 33**.

Our Privacy Policies are available to view at reisuper.com.au/privacy-policy or you can obtain a copy by contacting us on **1300 13 44 33**.

If you do not provide the personal information requested, we may not be able to manage your superannuation.

We may sometimes collect information about you from third parties such as your employer, a previous super fund, your financial adviser, our related entities and publicly available sources.

We may disclose your information to various organisations in order to manage your super, including your employer, our professional advisers, insurers, our related companies which provide services or products relevant to the provision of your super, any relevant government authority that requires your personal information to be disclosed, and our other service providers used to assist with managing your super.

In managing your super your personal information will be disclosed to service providers in another country, most likely to SS&C's processing centre in India. Our Privacy Policies list all other relevant offshore locations.

Our Privacy Policies set out in more detail how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact us on **1300 13 44 33** or write to our Privacy Officer, **PO Box 832, Newcastle NSW 2300**.

➤ PART 5: COMPLETE THE CHECKLIST

To enable your payment to be processed promptly, please ensure you have correctly completed this form before returning it to the fund.

Have you:

- ☐ Provided your member details in **Step 1?**
- ☐ Provided complete payment instructions in **Step 2?**
- ☐ Signed and dated the form in **Step 6?**

Completing Proof of Identity

- ☐ Have you attached the correct identification as outlined in the Completing proof of identity section? Select the identification you have provided:
 - ☐ One Primary identification document; or
 - ☐ Two Alternative identification documents (one from each of the lists specified)
- ☐ Is your identification current? If providing an Australian Passport, one that has expired within the last two years is acceptable.
- ☐ Is your document correctly certified? Ensure the certifier has included ALL of the following on each page:
- ☐ Do your documents need to be certified? If so, ensure the certifier has included ALL of the following on each page:
 - ☐ Written or stamped 'certified true copy'
 - ☐ Signature and printed name
 - ☐ Date – the date MUST be within twelve months of the date we receive your completed form.
 - ☐ Qualification (such as Justice of the Peace, Australia Post employee, etc)

Please refer to the 'Providing proof of your identity' section for more details on how to certify a document and a list of valid certifiers.

➤ PART 6: MEMBER SIGNATURE

By signing this form:

- I have read and understood this form.
- 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 privacy policy.

Signature



Date

/ /

➤ READY TO SEND US YOUR FORM?

Once you have completed and signed this form:

Post: REI Super, PO Box 832, 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**.

