

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 How to prove your identity guide under Publications and forms on 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.

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PART 3: PROVIDE PAYMENT INSTRUCTIONS

Please change my regular pension payment as follows:

ANNUAL PENSION AMOUNT.

I would like to receive my pension as follows: (Select only one option)

- ☐ 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)(*)

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 reissuper.com.au/pension-pds

* For Transition to Retirement Allocated Pensions, the nominated annual pension amount must be between the minimum and the maximum amounts permitted.

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

I wish to receive my pension as follows (Select only one option:

- ☐ **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.

PENSION PAYMENT FREQUENCY

I would like my pension to be paid (Select only one option)

- ☐ Monthly
- ☐ Quarterly
- ☐ Annually

Bank Account Details

Please pay my pension to my nominated account as follows: (tick only one box)

- ☐ Existing bank account **OR**
- ☐ New bank account (provide details below)

Name of financial institution

Branch name

Account name

BSB - Account number

Suburb

State Postcode

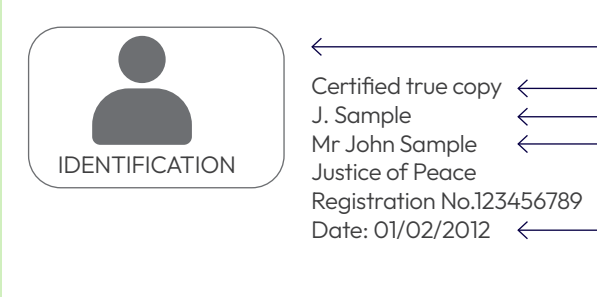
Request to vary your Pension Payment cont...

➤ PART 4: PROVIDING PROOF OF YOUR IDENTITY

We'll need your identification details to help us make sure it is you.

☐ I have attached copies of my documentation (driver's licence or passport). We will verify your identity electronically. If we cannot verify your identity electronically, we may ask for certified copies of your identification documents.

See How to prove your identity guide under Publications and forms on reisuper.com.au.



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

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

The authorised person's signature

Full name, qualification and registration number (if applicable) of the authorised person

Date of certification (within 12 months of receipt)

- 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

¹Alternative Identification and Verification processes available for customers experiencing short or long term barriers to accessing or providing standard identification — please contact us.

- 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)

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**.

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> 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:

See the How to prove your identity guide under Publications and forms on reisuper.com.au.

> 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.
- 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?

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**.