

Change of details TelstraSuper RetireAccess



Complete this form to change your bank account details
and/or your income stream payment amount or frequency.

RED SECTIONS FOR YOUR INFORMATION

GREY SECTIONS TO FILL OUT

Save time! Complete in **SuperOnline**

Before you start

- Read the current **TelstraSuper RetireAccess Product Disclosure Statement (PDS)** and the Important Information section at the end of this form
- If you have more than one account that you wish to change, you must complete a separate form for each account
- If you are changing your bank account details you will need to supply us with proof of your identity by completing **section 6**. For information on acceptable proof of identity documents and how to get documents certified see the Important Information at the end of this form or visit telstrasuper.com.au/proofofid
- You only need to complete the details that apply to the changes you wish to make to your account
- If you're signing this form on behalf of another person, you will need to provide identification in the member's name and attach an **Authorised Third Party Representative Identification** form available at telstrasuper.com.au/forms and include and certified documents as required

1. Your details currently held by TelstraSuper

Title	Mr	Mrs	Miss	Ms	Other
Member number*			Account number (if you have more than one account)		
Surname*			Date of birth*		
Given name(s)*					
Residential address*					
Suburb*			State*		Postcode*
Postal address (leave blank if same as residential address)					
Suburb			State		Postcode
Mobile/contact no.*			Email*		
*Mandatory fields					

YOUR
BASIC
INFO



Note: We'll be unable to process this form if your contact or personal details are different to the details we currently hold for you. To check and/or update your details before you submit this form you can:

- log into your SuperOnline account, or
- call us on **1300 033 166**, or
- complete a **Change of contact details** form to update your contact details or a **Change of member details** form to update your personal details available at telstrasuper.com.au/forms and submit it with this form.

2. Type of change

Please advise which details you wish us to update or change by ticking at least one of the following:

Change your bank details

AND/OR

Change your income stream payments

YOUR
CHANGE



Before you act

You may wish to consult an adviser before you make any decisions relating to your financial affairs. To speak with an adviser from TelstraSuper Financial Planning call **1300 033 166**.

3. Change your bank details (if applicable)

If you wish to change your bank details you must complete this section as well as **sections 5, 6 and 7**.

Payments can only be made to an Australian bank, credit union or building society account in your name or in a joint account. Payments **cannot** be made to credit cards.

You must provide a copy of your current bank statement (less than 6 months old) showing your address, the bank account details including the name the bank account is held in and the BSB and account numbers (you do not need to include your account balance or transactions details). Online transaction listings are not acceptable. Your statement can be uploaded via your SuperOnline account with your completed form.

Name of financial institution

Branch name

Account name

BSB no.

Account no.

Note: TelstraSuper does not accept responsibility for any delay or loss of interest caused by providing incorrect details on this form. TelstraSuper is discharged from all liability once your benefits are paid into your nominated account in accordance with your instructions.

4. Change your income stream payments (if applicable)

If you wish to change your income stream payments you must complete this section as well as **section 7**.

Nominate the account(s) the change will apply to:

Retirement or Transition to Retirement income stream **OR**

Term allocated pension **OR**

Both income stream and term allocated pension

Change payment frequency

To change the frequency of your payments tick one option only.

I request that the frequency of my TelstraSuper RetireAccess income payments be changed to:

Twice-monthly **OR**

Monthly **OR**

Quarterly **OR**

Annually (nominate month)

Note: If you elect twice-monthly payments, this form must be returned to us before the 8th of that month for a payment to be made on the 14th. Forms received between the 9th and 20th will have the initial payment made on the 28th of the same month. For all other payment frequencies, this form must be returned to us before the 20th to take effect that same month.

Change payment amount

To change the amount of your payments tick one option only. Annual payment limits can be found in the PDS.

I request that the regular payment amount for my TelstraSuper RetireAccess account for the remainder of this financial year be changed as follows:

Suspend payments for the remainder of the financial year^{*} **OR**

Apply the reduced minimum income payment limit **OR**

Apply the maximum limit per payment (only applicable to term allocated pension or Transition to Retirement income stream) **OR**

Apply the gross amount of \$ per payment (if you have a Transition to Retirement income stream this amount must be above the minimum limit and under the maximum limit of 10%)

^{*} If you have not met your annual minimum income limit for the financial year, you will receive a final payment before the end of the financial year to ensure your annual minimum is met.

Indexation of payments

I request that the gross amount is automatically indexed each year, effective 1 July*.

No

Yes. I want my annual income stream amount to be automatically indexed each year, by:

CPI

Nominated percentage

%

* The automatic indexation will take effect from the following financial year. If no instruction is received, automatic indexation will not be applied to your annual income stream. Indexation cannot be applied to your minimum or maximum income level.

5. Politically Exposed Person

1. Are you a Politically Exposed Person (PEP)? See the Important Information section for the definition of a PEP.

Yes No

2. If yes, please tick which PEP category applies to you:

- a) I hold a prominent public position or function in a government body or an international organisation
- b) I am an immediate family member of a person referred to in (a) above,
and that person's name is _____ and public position is _____
- c) I am a close associate of a person referred to in (a) above,
and that person's name is _____ and public position is _____

ARE
YOU A
PEP?
↙

6. Proof of Identity

Proof of your identity and the identity of any attorney, administrator or guardian who signs this form on your behalf must be supplied **every time** a change of details request is made. This can be done in one of two ways:

Option 1 – Electronic ID verification

By providing details of any **TWO** of the following identity documents – your Medicare card, pension card, Australian drivers licence, Australian passport – you agree to TelstraSuper using this information to verify your identity electronically using independent data sources.

By ticking this box:

- a) I confirm that I am authorised to provide these identification documents to TelstraSuper
- b) I acknowledge that my personal information will be sent to TelstraSuper's external identity verification provider to verify my identity with the identity records they hold for the purposes of this change of details request, and consent to that being done.

Important: Make sure the details you provide are accurate. If the personal details you provide in **section 1** do not match the electronic identification details you provide below, we will not be able to use these details to prove your identity. This will delay processing your request as we may require you to provide us with certified proof of identity documents.

Medicare:

Full name (including initials as shown on your Medicare card)

Medicare 10 digit number

Expiry date

mm/yyyy

Your reference number (the number beside your name)

Pension card:

Card type

Health Care Card

Seniors Health Card

Pensioner Concession Card

Full name (as shown on card)

CRN

– –

Expiry date

dd/mm/yyyy

Australian drivers licence:

Full name (as shown on your licence)

Australian drivers licence number

Expiry date

mm/yyyy

State of issue

Card number

Contact your licence provider if unsure of your card number

Australian passport:

First name (including middle name as shown on your passport)

Surname (as shown on your passport)

Australian passport number

Expiry date

mm/yyyy

Place of birth (as shown on your passport)

Option 2 – Certified document ID verification

See the Important Information section to understand the documents we can accept and how to get your proof of identity documents certified. Please note we may use these documents for the purpose of undertaking electronic data verification using independent data sources in the event your proof of identity documents have not been correctly certified. Your documents can be uploaded via your SuperOnline account with your completed form.

I have attached/uploaded a certified copy of **one photographic** proof of identity document

OR

I have attached/uploaded certified copies of **two non-photographic** proof of identity documents.

PROOF
OF
IDENTITY
↙

7. Your declaration and signature

By signing this form, I:

- declare that all the information I have provided on this form is true and correct
- understand that to change my details I must provide my proof of identity
- authorise TelstraSuper to update the details I have provided on this form
- consent to my personal information being used in accordance with TelstraSuper's Privacy Policy and Privacy Collection Statement
- understand that from time to time TelstraSuper may contact me to request additional information and to verify my instructions on this form
- consent to TelstraSuper verifying my identity via electronic means using independent data sources, or in the event my certified documents (if applicable) have not been correctly certified.

Each person who signs this form on behalf of the applicant named in this form:

- represents and warrants that they are lawfully appointed as guardian, administrator or attorney (as applicable), and
- declares that they are acting in accordance with the terms of the relevant power of attorney, guardianship order or administration order, including that if more than one person must act under the appointing document, all nominated persons must include their name, signature and date on this form below, and
- declares that their appointment remains valid and current as at the date of this form.

State your capacity (if applicable): Guardian Administrator Attorney

Name

Signature

X

Date

SIGN
↓



Please upload completed form via your SuperOnline account or return it to:

PO Box 14309, MELBOURNE VIC 8001

Before sending this form to TelstraSuper, please check that you have:

- ☒ read the Important Information section
- ☒ completed the sections that relate to the changes you want to make to your banking details and/or income stream payments
- ☒ provided details of two proof of identity documents or attached/uploaded certified copies of your proof of identity documents and linking documents (if required).



Definition of a Politically Exposed Person (PEP)

Politically Exposed Person or PEP means an individual:

- (a) who holds a prominent public position or function in a government body or an international organisation¹, including:
 - (i) Head of State or head of a country or government
 - (ii) government minister or equivalent senior politician
 - (iii) senior government official
 - (iv) Judge of the High Court of Australia, the Federal Court of Australia or a Supreme Court of a State or Territory, or a Judge of a court of equivalent seniority in a foreign country or international organisation
 - (v) governor of a central bank or any other position that has comparable influence to the Governor of the Reserve Bank of Australia
 - (vi) senior foreign representative, ambassador, or high commissioner
 - (vii) high-ranking member of the armed forces
 - (viii) Board chair, chief executive, or chief financial officer of, or any other position that has comparable influence in, any State enterprise or international organisation, or
- (b) who is an immediate family member of a person referred to in paragraph (a), including:
 - (i) a spouse
 - (ii) a de facto partner
 - (iii) a child, a child's spouse or de facto partner
 - (iv) a parent
- (c) who is a close associate of a person referred to in paragraph (a), which means any individual who is known (having regard to information that is public or readily available) to have:
 - (i) joint beneficial ownership² of a legal entity or legal arrangement with a person referred to in paragraph (a)
 - (ii) sole beneficial ownership² of a legal entity or legal arrangement that is known to exist for the benefit of a person referred to in paragraph (a).

1. International organisation essentially means an organisation established by a formal political agreement by two or more countries which has the status of an international treaty.

2. Beneficial ownership means directly or indirectly owning 25% or more of an entity or exercising operational or financial control over an entity.

Proof of Identity Guide

Your application cannot be processed until acceptable proof of identity documents have been provided to us as required by law when submitting a **Change of details form**.

Proof of your identity and the identity of any attorney, administrator or guardian who signs this form on your behalf must be supplied every time a change of details request is made. This can be done in one of two ways:

1. Electronic ID verification

Supply details of any **TWO** of the following identity documents: Medicare card, pension card, Australian drivers licence or Australian passport, and you consent for TelstraSuper to verify your identity electronically using independent data sources.

OR

2. Certified proof of identity documents

Supply a certified copy of one acceptable photographic ID document or two non-photographic ID documents.

Acceptable photographic ID (one document required)

Certified copy of one of the following documents:

- current Australian driver's licence or permit that contains your photograph
- current passport
- current Proof of Age card containing your photograph
- national identity card containing your photograph and signature.

Acceptable non-photographic ID (two documents required)

Certified copy of one of the following documents:

- Medicare card
- birth certificate
- a citizenship certificate issued by the Commonwealth or a foreign government
- low income health care card or Commonwealth seniors health card or Pensioner Concession Card

AND

Certified copy of one of the following documents containing your name and current residential address:

- a council rates notice (less than 3 months old)
- gas, water or electricity bill (less than 3 months old)
- a notice of assessment from the ATO (less than 12 months old)

A complete list of acceptable identification is available on our website at telstrasuper.com.au/proofofid

Signing a document on behalf of another person

You must complete and attach an **Authorised Third Party Representative Identification** form including a certified copy of the document by which you are authorised to sign on behalf of another person:

- power of attorney document
- guardianship order
- administration order.

For a copy of an **Authorised Third Party Representative Identification** form go to telstrasuper.com.au/forms



Proof of Identity Guide (continued)

How to get your proof of identity documents certified

- Photocopy your identity documents (if you're using your driver's licence, photocopy both sides)
- Take the photocopies and the original documents to a person authorised to certify proof of identity documents:
 - If living in Australia: This includes pharmacists, police officers or a Justice of the Peace.
 - If living overseas: This must be a person who is an Australian Consular Officer or a foreign notary public.

For a complete list of people authorised to certify proof of identity documents in Australia and overseas visit telstrasuper.com.au/proofofid

To certify your documents, the authorised person must:

- sight the original and the copy
- confirm that the documents are identical
- write or stamp on the photocopy:
 - 'I certify that this is a true and correct copy of the original document I have sighted', and
 - their name, qualification, business address, and registration number (if applicable), and
 - their signature and date on all pages of the photocopy.

You must keep the original proof of identity documents and send the certified copy of your proof of identity documents to us.

Example



I certify that this is a true and correct copy of the original document I have sighted.

J Sample

Joan Sample
11 Same St, SOMETOWN VIC 3009

Justice of the Peace
Reg no: 26587
1 March 2020

Telstra Super Pty Ltd, ABN 86 007 422 522, AFSL 236709 is the trustee of the Telstra Superannuation Scheme ABN 85 502 108 833 (TelstraSuper).

Telephone 1300 033 166 Website telstrasuper.com.au

Telstra Super Pty Ltd complies with the Privacy Act 1988 (Cth). For further information on privacy visit our website at telstrasuper.com.au to download a copy of our Privacy Policy and Privacy Collection Statement.

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