Convert to taxed or untaxed pension

Use this form to switch your lifetime pension to come from a taxed or untaxed source
You can make this switch once per financial year

1. Your details

Title: ☐ Mr ☐ Ms ☐ Mrs ☐ Other

Date of birth (dd/mm/yyyy)

Given name(s)

Surname

Residential address (required)

Suburb/Town | State | Postcode

Postal address (if different)

Unit number | Street number | Street name

Suburb/Town | State | Postcode

Telephone (business hours) | Mobile

Email address

Secondary email address

Membership number

Effective date of change (dd/mm/yyyy) 01 07

2. Request to convert

☐ I request the Trustee of the Electricity Industry Superannuation Scheme (ElectricSuper) convert my current taxed pension to an untaxed pension or my current untaxed pension to a taxed pension.

3. ATO tax file number declaration

You need to complete a tax file number declaration as part of converting your pension from a taxed to untaxed source, or from an untaxed to a taxed source.

You can do this online in your myGov account: in the ATO Online section, select **Employment** > then **New Employment**

The online form can be used for employment and non-employment related payments.

Don't have access to an online myGov account?
You can download a tax file number declaration form from the ATO's website, or request one from our Helpline on 1300 307 844.

4. Sign this form

By signing this form, I declare that I:

- authorise ElectricSuper to make the changes on this form regarding my pension payments
- have fully read this form
- understand the impact on my pension if this request is approved
- understand that the conversion will occur from the effective date on page 1 and will apply for a minimum of 12 months
- understand and consent to ElectricSuper collecting my information and using it as outlined in the Privacy Policy.

I also declare that I:

- understand that I am responsible for ensuring that this request is in my best interests
- understand that ElectricSuper recommends that I seek financial advice regarding this change and its impact on my financial situation before I take action.

Signature

(dd/mm/yyyy)

The conversion of any lifetime pension is at the discretion of the ElectricSuper Board and may not be approved.

Lodge your form

electricsuper.db@rs.mpms.mufg.com

or

Post to: ElectricSuper
PO Box 126 Parramatta NSW 2124

Your privacy

Refer to www.electricsuper.au/privacypolicy for information on how your provided information is used and how we treat your privacy.

Queries

1300 307 844
www.electricsuper.au

Issued by the Electricity Industry Superannuation Board ABN 42 457 486 237 as trustee of the Electricity Industry Superannuation Scheme ABN 57 923 283 236

Disclaimer: The information relating to ElectricSuper is subject to change from time to time. The ElectricSuper Rules (the 'Rules') are the final authority when any discrepancy arises between the Rules and any other information about the scheme. The Electricity Industry Superannuation Board recommends that you consult a licensed or appropriately authorised financial consultant before taking action regarding your superannuation.

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