



Pension Change

Use this form to update your Income Stream Pension:

- Change the frequency/amount
- Update your personal details
- Update your bank details
- Change preservation status (TTR only)

Use this form to update your Lifetime (defined benefit) Pension:

- Update your personal or bank details

1. Your details

Title: ☐ Mr ☐ Ms ☐ Mrs ☐ Other _____ Date of birth: ____/____/____

Given names: _____

Surname: _____

Residential address (required): _____

Suburb: _____ State: _____ Postcode: _____

Postal address (if different): _____

Suburb: _____ State: _____ Postcode: _____

Daytime phone number: _____ Mobile number (if different to daytime number): _____

Email address: _____

Membership number: _____ Date left employer: _____

_____/____/____

Are you receiving a...

- ☐ Retirement Income Pension
- ☐ Transition to Retirement Income Pension
- ☐ Lifetime defined benefit pension (former members of Division 3)

2. What do you want to do?

- ☐ **Change payment amount** Complete Sections 1, 3 & 8
- ☐ **Change bank details** Complete Sections 1, 4 & 8
- ☐ **Change my name** Complete Sections 1, 5 & 8
- ☐ **Change my contact details** Complete Sections 1, 6 & 8
- ☐ **Update my preservation status** Complete Sections 1, 7 & 8

3. Change the amount/frequency of your Pension

Retirement Income Stream and Transition to Retirement Income Stream members only

Pension amount

Please change my regular pension (before tax) payment:

- ☐ Minimum amount permitted
- ☐ Maximum amount permitted (Transition to Retirement Pensions only)
- ☐ Nominated amount of \$ _____ * per year (before tax)

* Retirement Income Streams must be above the minimum permitted

* Transition to Retirement Income Streams must be above the minimum and below the maximum permitted.

- ☐ I wish to receive my changed pension amount for the remainder of this financial year.
The nominated annual pension amount will apply from the time my form has been received and processed.
- or
- ☐ I wish to receive my changed pension amount for this 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 frequency

I would like my pension to be paid:

- ☐ Fortnightly
- ☐ Monthly
- ☐ Quarterly
- ☐ Half-yearly
- ☐ Yearly

For quarterly, half-yearly and yearly, please
nominate the month you would like your
pension to commence:

MM / YYYY

4. Update your bank details

☐ I have provided my bank account details and certified ID within the last 12 months

or

My BSB: _____ - _____

My account number: _____

My account name: _____
an account in your name or a joint account where you are one of the account holders

Name of financial institution: _____

Remember!

You must provide certified copies of your ID documents to receive a payment.

This could be your drivers licence or passport.

See our website for Proof of ID information.

☐ Retain these bank details and ID for future use

5. Update your name

☐ I have changed my name. My new full name is:

My new title is: ☐ Mr ☐ Ms ☐ Mrs ☐ Other _____

You must provide certified proof of your name change (such as a Marriage Certificate, Deed Poll or change of name certificate from Births, Deaths and Marriages)..

6. Update your contact details

☐ My new address is: ☐ Postal ☐ Home

Address Line 1:

Suburb:

State:

Postcode:

You must provide certified proof of your new postal address (such as a recent bill, mail item or driver's licence showing your new postal address)

☐ My new email/phone is:

Daytime phone number:

Mobile number (if different to daytime number):

Email address:

7. Update your preservation status

Transition to Retirement Income Stream members only

Your transition to retirement benefit is subject to tax on the earnings of your investments. When a condition of release has been met (for example, retirement), these benefits will become tax-free.

When you advise us you have met a condition of release your current account balance in the Income Stream will move to the equivalent tax-free investment options.

Once in the retirement phase, your balance will be assessed against the Transfer Balance Cap. More information about this Cap can be found at www.ato.gov.au or speak to your financial adviser.

I am now:

- ☐ At least 60 years of age and I have ceased employment since turning 60.
- ☐ At least 60 years of age, have ceased employment and intend to permanently retire* from the workforce.

* Permanently retired is defined as never being gainfully employed again for more than 10 hours a week.

Gainful employment means employed or self-employed for gain or reward in any business, trade, profession, calling occupation or employment.

If you meet one of the conditions above, attach proof of age with this form.

When you reach age 65, your transition to retirement pension will automatically transfer to the tax-free investments and count towards your Transfer Balance Cap.

8. Sign the form

By signing this form, I confirm that I:

- have read understood this form
- understand my details cannot be updated unless the required documents (such as proof of name change, proof of ID, etc) are provided
- understand that I must keep a copy of this form for 5 years from the date below under ATO regulations

Signature:

Date:

____ / ____ / ____

Lodge your form

If no proof of ID documents required:
electricsuper@mercer.com

or

If proof of ID documents are required:

ElectricSuper
GPO Box 4303
Melbourne Vic 3001

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 57 923 283 236 as Trustee of the Electricity Industry Superannuation Scheme.

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