Pension Change

Use this form to update your Income Stream Pension:

- Change the frequency/amount of your pension
- 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 (dd/mm/yyyy) ____ ____ ____

Given name(s)

Surname

Any other names known by (eg. also known as/a former name/an anglicised name)

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 Occupation

Date left employer (dd/mm/yyyy) ____ ____ ____ Industry of your occupation:

☐ Electricity supply ☐ Other (please specify) _____

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 & 9
- ☐ **Change bank details** Complete Sections 1, 4, 8 & 9
- ☐ **Change my name** Complete Sections 1, 5, 8 & 9
- ☐ **Change my contact details** Complete Sections 1, 6, 8 & 9
- ☐ **Update my preservation status** Complete Sections 1, 7 & 9

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 instalment (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.

Pension frequency

I would like my pension to be paid:

☐ Fortnight ☐ Monthly ☐ Quarterly ☐ Half-yearly ☐ Yearly

For quarterly, half-yearly and yearly, please nominate the month you would like your pension to commence: mm/yyyy) _____ _____

Note – If you have already been paid the legislated minimum annual amount and wish to cease your payments for the remainder of the financial year, please enter $0.00 in the 'Nominated Amount'

4. Update your bank account

My BSB _____ My account number _____

Account held in the name of (this account must be in your name or a joint account where you are one of the account holders)

_____

Name of financial institution

_____

☐ I have provided a copy of my bank statement (optional) so my details can be double-checked.

Remember! If you want to change your nominated bank account, you'll need to enter your new account details below and provide proof of your identity.

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/Town | 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:

Membership number | Occupation

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. Proof of identity

Choose how you'll provide proof of your identity:

☐ Electronic ID (this is the easiest way) – Write down the details of your ID below, then go to **Step 9**

☐ By post (certified ID) – Go to **Step 9** and provide certified copies of your documents. Refer to the Identification (ID) requirements flyer at the end of this form.

☐ By email (Selfie ID) – Go to **Step 9** and email us your documents. Refer to the Identification (ID) requirements flyer at the end of this form.

8. Proof of identity (continued)

Electronic ID

Important: Please complete all fields below so we can complete an electronic ID check. If your personal details in **Step 1** don't match your ID details, we won't be able to verify your identity. This will delay your request as we may ask for additional certified identification. Please give us a call if you need help with this.

Part 1: Medicare details

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

Medicare number

Valid to (mm/yyyy)

Your reference number on this card

Part 2: Either Australian driver's licence or Australian passport – you don't need to supply both

1 Driver's licence number

Full name (including middle name as shown on licence)

State

Expiry date (dd/mm/yyyy)

Driver's licence card number

2 Passport number

Full name (including middle name as shown on passport)

Place of birth (as shown on your passport)

Country of birth (as shown on your passport)

Family name at birth (this isn't shown on your passport)

9. Sign the form

By signing this form, I confirm that:

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

Signature

(dd/mm/yyyy)

Lodge your form

If no proof of ID documents required:
electricsuper.admin@rs.mpms.mufg.com

or

If proof of ID documents are required:
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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electricsuper

Identification (ID) requirements

You'll need to provide proof of identity when you:



Withdraw your super or fully withdraw your income stream or fully commute a Division 3 Pension



Rollover to a self managed super fund (SMSF)



Ask us to search for lost super



Start a retirement income stream or commence a Lifetime Pension



Update your banking details

People signing on your behalf will also need to provide proof of identity.

Three ways you can provide proof of your identity

Option 1.
Electronic ID

This is the easiest way to provide proof of your identity.

Write down the details of your ID on the forms you're sending us. You'll need to have these handy:

1. Medicare card **and**
2. Australian driver's licence or Australian passport

We'll use the details you give us to do an electronic ID check. Please complete all fields on this form. For help locating your driver's licence card number, see page 4.

Option 2.
By email (Selfie ID)

Email us your form and electronic copies (scanned or clear photos) of your ID. Your ID doesn't need to be certified. Send us:

1. A photo of you holding your Australian driver's licence **and** a clear photo of the back of the driver's licence





or a photo of you holding your passport



Take your selfie close-up so we can see the writing on your ID

2. **And** any other documents that may be required – see page 2.

Option 3.
By post or in person (Certified ID)

You'll need to post or give us your form with certified copies of documents:

1. A certified copy of your Australian driver's licence (both sides) or Australian passport **and**
2. Any other documents that may be required – see page 2

See page 3 for how to get your ID certified.

Documents you need to give us

What do you want to do?	Electronic ID	Selfie ID/Certified ID
Withdraw $50,000 or less* includes full withdrawals from an ElectricSuper Income Stream or commutation of Division 3 Pension or **Rollover $50,000 or less* to a SMSF**	As described on page 1 – write your ID details on your form	Australian driver's licence (both sides) **or** Australian passport.
Withdraw more than $50,000* includes full withdrawals from an ElectricSuper Income Stream or commutation of Division 3 Pension **or Rollover more than $50,000* to a SMSF**	As described on page 1 – write your ID details on your form	1. Australian driver's licence (both sides) **or** Australian passport **and** 2. Bank statement (dated within six months) where your payment will be made and 3. One of these: • Phone, electricity, gas or water bill (dated within three months) • Council rate or Australian Taxation Office (ATO) notice (dated within 12 months) • Birth certificate/extract, citizenship certificate or pension card.
Open an ElectricSuper Income Stream or Division 3 Pension **or** **Change your ElectricSuper Income Stream or Division 3 Pension banking details**	As described on page 1 – write your ID details on your form	1. Australian driver's licence (both sides) **or** Australian passport **and** 2. Bank statement (dated within six months) where your payment will be made **and** 3. One of these: • Phone, electricity, gas or water bill (dated within three months) • Council rates or ATO notice (dated within 12 months) • Birth certificate/extract, citizenship certificate or pension card.
Search for lost super	As described on page 1 – write your ID details on your form	1. Australian driver's licence (both sides) **or** Australian passport **and** issued concession card **and** 2. One of these: • Phone, electricity, gas or water bill (dated within three months) • Bank statement (dated within six months) • Council rates or ATO notice (dated within 12 months).
Correct your date of birth	As described on page 1 – write your ID details on your form	Australian driver's licence (both sides) **or** Australian passport **or (certified ID only) birth certificate/extract.**
Change your name	Not available	1. Australian driver's licence (both sides) **or** Australian passport . 2. One of these showing a relationship exists between the two (or more) names: • Marriage certificate • Decree absolute (divorce certificate) • Deed poll or Change of name certificate from the Births, Deaths and Marriage Registration Office. *If the name on your account is incorrect (e.g. spelling mistake or employer error), please provide a certified copy of your driver's licence (both sides) or passport and a hard copy Statutory Declaration.*
To sign on behalf of an ElectricSuper member	To set up a Power of Attorney (POA) or Guardianship and make a request: 1. Provide Guardianship papers **or** Post the certified hard copy of the *Power of Attorney* document (every page) **and** 2. Include the relevant form for your request (e.g. withdrawal form) **and** 3. Write your ID details on the *Proving your identity electronically* form. Once the POA/Guardianship is set up, you can use the *Proving your identity electronically* form to sign on behalf of the member. The member's proof of identity will also be required.	To set up a POA or Guardianship and make a request: 1. Provide Guardianship papers **or** Post the certified hard copy of the Power of Attorney document (every page) **and** 2. Include the relevant form for your request (e.g. withdrawal form) **and** 3. Certified ID as indicated in the table above (depending on the type of request). Once your POA/Guardianship is set up, you can use the Proving your identity electronically form to sign on behalf of the member or be required.

* These limits are before tax has been deducted or any interest adjustments.

Hints, tips and troubleshooting

Your ID and account details must match

If you're changing your name, you'll need to provide documentation to prove the change of name (see table on page 2).

Your ID needs to be current and show your name and residential address

Your documents can't be expired, except for an Australian passport which can be used if it expired within the last two years. All certified ID must be dated within 12 months.

Bank statements must show your current name and address

You might be able to download one from your online banking. If your bank account is new and you haven't received a statement yet, you'll need to provide a letter from your bank that shows your name, address, account details and the bank's stamp.

Don't have a driver's licence or passport?

If you don't have a driver's licence or passport, you must provide **four certified documents** from the below list:

1. Bank statement (dated within six months) **and**
2. Birth certificate or birth extract, pension card or Australian citizenship certificate **and**
3. Letter from Centrelink about a benefit, Council rates or ATO notice (dated within 12 months) **and**
4. Phone, electricity, gas or water bill (dated within three months).

If you can't provide the ID we've asked for, give us a call on 1300 307 844 to discuss alternatives.

How to get your ID certified

Take your original documents and a clear photocopy of both sides to an authorised person (see *Who can certify documents*). If documents are written in a foreign language, you'll need to supply an English translation by an accredited translator.

The authorised person needs to:

1. Write or stamp in English on the photocopies words to the effect of 'This is a true and correct copy of the original'.
2. Write their name, qualification (for example, Justice of the Peace, Police Officer, Pharmacist, etc), address and registration number (if applicable).
3. Sign and date the copy.

Example:



* Australia Post may charge to certify ID (contact Australia Post for details).

† These people can certify your ID if you're outside of Australia.

Who can certify documents

You can meet with us in person and we'll certify your documents. Find our details at electricsuper.au/meet-with-us/.

The following authorised people can certify your documents.

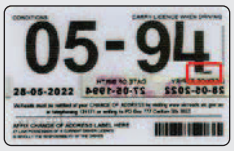
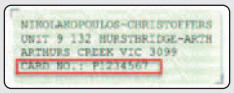
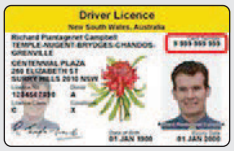
- police officer
- permanent employee or agent of Australia Post* with five or more years' continuous service, who is employed in an office supplying postal services to the public
- finance company officer with two or more years' continuous service (with one or more finance companies)
- officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), with two or more years' continuous service (with one or more licensees)
- notary public officer†
- registrar or deputy registrar of a court
- Justice of the Peace†
- member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants
- person enrolled as a legal practitioner on a State or Territory Supreme Court, or the High Court of Australia
- Australian consular officer or diplomatic officer†
- Judge, magistrate† or chief executive officer of a Commonwealth court.

The following people can also certify identification – except if you're rolling over your account to a SMSF:

- dentist
- medical practitioner
- optometrist
- pharmacist

Find your driver's licence card number

Each Australian driver's licence has a unique card number, which is different to your licence number. The location of your driver's licence card number will be different, depending where and when the licence was issued. Check the table below:

Where/when your driver's licence was issued	Location of your card number
Victoria Your licence or learner's permit was issued before November 2022 and you've not reported a data breach.	 Your driver's licence card number is also shown in your VicRoads account – go to vicroads.vic.gov.au to log in.
Victoria Your licence or learner's permit was issued after November 2022, or your licence or learner's permit was re-issued due to a data breach.	 Your driver's licence card number is also shown in your VicRoads account – go to vicroads.vic.gov.au to log in.
Victoria If you've changed your address, this sticker will be on the bottom left at the back of the card and it will show your card number.	
New South Wales	
Northern Territory Your licence was issued before 10 December 2020.	
Northern Territory Your licence was issued from 10 December 2020 onwards.	
Australian Capital Territory (ACT)	
Queensland Your licence was issued before June 2019.	
Queensland Your licence was issued after June 2019.	
South Australia	
Tasmania	
Western Australia	

Please send us your form with your ID

By email: If you're providing Selfie ID. You need to use the email address that's on your ElectricSuper account.

By post or in person: If you're providing certified ID or a hard copy of a POA/Statutory Declaration.

If you need help with proof of identity, call us on the number below, or arrange to meet with us – head to **https://electricsuper.au/meet-with-us/** to find how.

electricsuper.admin@rs.mpms.mufg.com
electricsuper.com.au

1300 307 844
7.30 am to 5.30 pm
(ACST/ACDT)
Monday to Friday

ElectricSuper
PO Box 126
PARRAMATTA NSW 2124

Meet us in person
electricsuper.au/meet-with-us/

Issued by the Electricity Industry Superannuation Board ABN 57 923 283 236 as Trustee of the Electricity Industry Superannuation Scheme. 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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