# Change your details - Retirement Income and Transition to Retirement Income



## About this form

Use this form to change or update your details on a Retirement Income or Transition to Retirement (TTR) Income account. If you have a super account, please use our *Change your details* form. It's easy to change your address, contact and income payment details by logging into your account at **csf.com.au**. Changes to your name, date of birth and bank account details need to be completed on this form and supported with evidence. The documents required are explained on page 2 of this form. In some circumstances, Catholic Super may need to request further evidence before proceeding with other change requests.

## 1 – Your member details

## Please complete in pen using CAPITAL letters

Member number		
Title  Mr  Ms  Miss  Other	Sex II Male Female	Date of birth (ddmmyyyy)
First name	Last name	
Postal address (must be provided)		
Suburb		
State Postcode Country (if not Australia)		
Business hours phone After hours phone	Mobile	
Email		

Need help?

1300 655 002

Catholic Super, GPO Box 4303, Melbourne VIC 3001

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#### 2 - Your updated member details (you only need to update the information below that has changed)

Title Mr Mrs Ms Miss Other	Sex Male Female	Date of birth (ddmmyyyy)
First name	Last name	
Residential address (must be provided)		
Suburb		
State Postcode Country (if not Australia)		
Postal address (if different from Residential address)		
Suburb		
State Postcode Country (if not Australia)		
Business hours phone After hours phone	Mobile	3
Email		

I have attached certified proof of identity to support any change to my name or date of birth.

## Change of name and/or date of birth

If you have changed your name, you will need to provide a certified copy of your Marriage Certificate, Deed Poll or Decree Nisi.

If you are changing your date of birth recorded by Catholic Super, you will need to provide a certified copy of either your Birth Certificate, Passport or Driver's Licence.

Please note that faxed or scanned copies of certified documents are not acceptable and you should not send your original proof of identity documents to Catholic Super.

All copied pages of ORIGINAL proof documents need to be certified by an individual authorised to do so. They must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (eg Justice of the Peace, Australia Post employee etc) and date.

#### The following are examples of people that can certify copies of the originals as true and correct copies:

- Pharmacist
- Justice of the Peace
- Notary Public
- · Medical practitioner or nurse
- Police officer
- · Accountant (CA/CPA)
- · Legal practitioner
- Financial planner (Officer with or Authorised Representative of an Australian Financial Services Licensee) (with two years' experience)
- Full time teacher (school or tertiary)
- Bank/credit union/building society officer (with two years' experience)
- Permanent employee of a Commonwealth, State/Territory or local government (with two years' service)

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#### 3 - Change your income payments (you only need to update the sections below that you wish to change)

Your existing income payment arrangements will continue for any section that you do not complete or is not completed properly. If the amount you nominate to be paid in (b) is outside the permitted limits, your income payment amount will be adjusted to the minimum or maximum amount allowed.

(a) How often do you want to receive income payments from now on?

	I don't want to change my income payment frequency						
	Fortnightly Monthly (28th of each month) Income payments will start from the next available payment date after we have set up your account.						
	Quarterly Half-yearly Yearly	Please nominate the first month in v commence (mmyyyy):	which your payment cycle is to				
(b)	How much do you want to receive per income payment?						
	I don't want to change the amount I receive per payment						
I want to receive the minimum amount							
	I want to receive a nominated amount of \$	per payment					
	I want to receive the maximum amount permitted - for Trai	nsition to Retirement Income accounts	s only where a 10% maximum applies				
(c)	Where would you like your payments to go?						
	I don't want to change my bank account details						
	<b>OR</b> my new bank details are:						
	Name of Australian bank, building society or credit union		BSB				
	Your account name (must be a personal account held solely or jointly in y	/our name)	Account Number				
	Please provide proof of identity documents and a co	opy of your bank statement showir	ng the account name, BSB				

and account number. If required, Catholic Super may seek further evidence prior to making payments to a new account. Go to csf.com.au to see our proof of identity guide.

## 4 – Request for a Centrelink Schedule

A Centrelink Schedule is a document that is used to inform Centrelink of the various components relating to your superannuation income stream. If you tick this box, we will issue a Centrelink Schedule in accordance with the communication preferences recorded on your income account.



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## 5 – Change your preservation status (Transition to Retirement Income accounts only)

By ticking one of these boxes your account will convert to a Retirement Income account. Make sure you consider the financial and Centrelink implications of declaring that you've retired. You cannot invest more than the Transfer Balance Cap in your Retirement Income account, so see the ATO website or contact us for more information if this may apply to you.

I'm 65 or older

I'm 60 or older and have changed jobs or retired since turning 60

I have reached my preservation age (see table) and have permanently retired from the workforce

Date of birth	Preservation age
Before 1 July 1962	57
1 July 1962 to 30 June 1963	58
1 July 1963 to 30 June 1964	59
1 July 1964 or after	60

### **Privacy**

The personal information you provide on this form will be used in accordance with Together Trustee's Privacy Statement, which you can view online at **csf.com.au/privacy** or you can obtain a copy by contacting us on **1300 655 002**.

Together Trustee's Privacy Collection Statement details 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 includes details on how we collect, disclose and manage your personal information, including other entities and offshore locations that may receive or provide your information.

Our administrator, Mercer Outsourcing (Australia) Pty Ltd (Mercer), will also handle your personal information. You can view Mercer's Privacy Policy online at **mercer.com.au/privacy** 

If you have any other queries in relation to privacy issues, you can contact us or write to our Privacy Officer, GPO Box 4303, Melbourne VIC 3001.

## 6 – Sign the form

#### By signing this form I:

• authorise Catholic Super to make the changes noted on this form.

• understand that some of my personal details cannot be updated unless I provide the necessary supporting documentation.

Signatare	•			

Date (c	ldmmyy	'yy)	

Please return your completed form to Catholic Super, GPO Box 4303, Melbourne Vic 3001.



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