

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 Mrs Ms Miss Other

Sex

Male Female

Date of birth (ddmmyyy)

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



csf.com.au



Catholic Super, GPO Box 4303, Melbourne VIC 3001

Issued by Togethr Trustees Pty Ltd ABN 64 006 964 049 AFSL 246383 as trustee for Equipsuper ABN 33 813 823 017 USI 33 813 823 017 000. Catholic Super is a division of Equip Super.

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

| | | |
|---|--|--|
| Title Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Other <input type="checkbox"/> <input type="text"/> | Sex Male <input type="checkbox"/> Female <input type="checkbox"/> | Date of birth (ddmmyyyy) <input type="text"/> |
| First name <input type="text"/> | Last name <input type="text"/> | |
| Residential address (must be provided) <input type="text"/> | | |
| Suburb <input type="text"/> | | |
| State <input type="text"/> | Postcode <input type="text"/> | Country (if not Australia) <input type="text"/> |
| Postal address (if different from Residential address) <input type="text"/> | | |
| Suburb <input type="text"/> | | |
| State <input type="text"/> | Postcode <input type="text"/> | Country (if not Australia) <input type="text"/> |
| Business hours phone <input type="text"/> | After hours phone <input type="text"/> | Mobile <input type="text"/> |
| Email <input type="text"/> | | |

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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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.

Signature

Date (ddmmyyyy)

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

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