

# MyLife MyPension

## Request to Vary Your Pension Payment

If you need help

For assistance call the MyLife MyPension Service Centre on **1300 963 720**.

### Step 1 – Complete your personal details

Please print in black or blue pen, in uppercase, one character per box.



Title Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other    Date of birth   /   /

Given names

Surname

Postal address

Suburb

State    Postcode

Daytime Telephone   -

Fax   -

E-mail

Membership number

Pension Type (select an option ☒)

☐ Account Based Pension

☐ Pre-Retirement Pension

☐ Term Allocated Pension

### Step 2 – Provide payment instructions

Please change my regular pension payment as follows :

I wish to receive my pension as follows (tick one box only ☒)

- ☐ Minimum amount permitted
- ☐ Maximum amount permitted (Only applicable to Pre-Retirement and Term Allocated Pensions)
- ☐ Nominated amount of \$    ,    <sup>(\*)</sup>
- ☐ Specific annual percentage   % \*\*

\* For Pre-Retirement and Term Allocated Pensions, the amount must be between the minimum and the maximum permitted.

\* For Account based pensions, the amounts must be at least the minimum permitted.

\*\* The percentage amount nominated will be calculated using either the balance of your account at 1 July within the current financial year or the opening balance of your account within the current financial year.

Continued over



## Step 2 – Provide payment instructions (continued)

I wish to receive my pension as follows (tick one box only ☒ )

☐ **Change my Annual Pension Amount for the remainder of the financial year**

The nominated annual pension amount will apply from the time my form has been received and processed.

☐ **Change my Annual Pension Amount for the complete financial year**

This 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.

The frequency of my pension is

☐ Fortnightly

☐ Monthly

☐ Quarterly

☐ Half-yearly

☐ Yearly

Please nominate the month in which your payment is to commence.   /   \*

\* If no nomination is made the payment variation will be processed on the next available pension payment date.

### Bank Account Details

Please pay my pension to my nominated account as follows:

☐ Existing bank account

☐ New Bank account

My new bank account details are as follows:

Name of Institution

Branch Name

BSB

Account Number

Account Name

## Step 3 – Providing proof of your identity

### Do you need to provide new certified proof of identity?

Please indicate (☒) if one of the following applies. Please note that if the information provided below does not match our records, your payment will be delayed.

☐ You have not provided certified ID previously

☐ You have changed your name (either your first or last name) – see below (under Name Change) for the list of specific documents required.

☐ Your date of birth was incorrect on our records and has been updated

☐ You have changed your bank account details.

**If you have ticked one of the items above, you will need to provide new certified proof of identity.**

The easiest way to do this is as follows:

- photocopy both sides of your current drivers licence or passport
- take the photocopies of your ID and the original of the partly completed statutory declaration to Australia Post\* or your local Police station\*\*
- ask them to certify your ID.

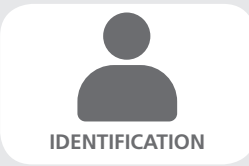
\* to be able to certify your documents, the Australia Post employee must be a permanent employee of the Australian Postal Corporation with 2 or more years of continuous service in an office supplying postal services to the public. Australia Post will charge a small fee for each photocopy you need to get certified.

\*\*a police officer, sheriff or sheriff's officer can certify your ID.

**Continued over**

## Step 3 – Providing proof of your identity (continued)

The person certifying your ID documents will include the following details on the copy:

	<p>← A clear copy of the document that identifies you (i.e. your driver's licence (front and back) or passport)</p> <p>Certified true copy ← Write or stamp 'certified true copy' of the original document</p> <p><i>J. Sample</i> ← The authorised person's signature</p> <p>Mr John Sample ← Full name, qualification and registration number (if applicable) of the authorised person</p> <p>Justice of Peace</p> <p>Registration No. 123456789 ← Date of certification (within 12 months of receipt)</p> <p>Date: 01/02/2015 ←</p>
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Alternatively, you can refer to the Completing Proof of Identity fact sheet on the fund's website at [www.mylifemypension.com.au](http://www.mylifemypension.com.au) for a list of other people who can certify your ID document(s) and witness your statutory declaration.

### If you don't have a driver's licence or passport

You will need to provide a certified copy of one document from each of the following groups:

- Birth certificate or birth extract<sup>1</sup>
- Citizenship certificate issued by the Commonwealth
- Pension card issued by the Department of Human Services (Centrelink) that entitles the person to financial benefits

AND

- Letter from the Department of Human Services (Centrelink) or other Government body in the last 12 months regarding a Government assistance payment
- Tax Office Notice of Assessment issued in the last 12 months
- Rates notice from local council issued in the last 3 months
- Electricity, gas or water bill issued in the last 3 months
- Landline phone bill issued in the last 3 months (mobile phone bills will not be accepted)

### Name change

If you have changed your name, you must provide a certified copy of the relevant name change document<sup>1</sup>, for example, a marriage certificate, deed poll, decree nisi/divorce order or change of name certificate issued by the Births Deaths and Marriages Registration office.

### <sup>1</sup> Translation

If your identification is written in a language other than English, the identification must be accompanied by an English translation prepared by a translator accredited by the National Accreditation Authority for Translators and Interpreters Ltd. (NAATI) at the level of Professional Translator or higher (or an equivalent accreditation), to translate from a language other than English into English.

## Step 4 – Complete the checklist

To enable your payment to be processed promptly, please ensure you have correctly completed this form before returning it to the fund. Have you:

- ☐ Provided your member details in **Step 1**?
- ☐ Completed all steps of the form and provided copies of documentation (where required)?
- ☐ Signed and dated the form (**Step 5**)?

### Completing Proof of Identity

- ☐ Select the identification you have provided:
  - ☐ One Primary identification document; or
  - ☐ Two Alternative identification documents (one from each of the lists specified)
- ☐ Is your identification current? If providing an Australian Passport, one that has expired within the last two years is acceptable.
- ☐ Is your document correctly certified? Ensure the certifier has included ALL of the following on each page:
  - ☐ Written or stamped 'certified true copy'
  - ☐ Signature and printed name
  - ☐ Date – the date MUST be within twelve months of the date we receive your completed form.
  - ☐ Qualification (such as Police Officer, Australia Post employee, etc)

Please refer to the Providing proof of your identity section for more details on how to certify a document and a list of valid certifiers.



## Your Privacy

The Fund is administered by us along with our service provider, Mercer Outsourcing (Australia) Pty Ltd. We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information and marketing material about the other products and services offered by us and our related bodies corporate. If you do not wish to receive marketing material, please contact us on **1300 963 720**.

Our Privacy Policy is available to view at [mylifemypension.com.au/privacy](http://mylifemypension.com.au/privacy) or you can obtain a copy by contacting us on **1300 963 720**.

When you become a member, we assume that you consent to this handling of your personal information. If you do not provide the personal information requested, we may not be able to manage your superannuation.

We may sometimes collect information about you from third parties such as your employer, a previous super fund, your financial adviser, our related entities and publicly available sources.

We may disclose your information to various organisations in order to manage your super, including your employer, our professional advisors, insurers, our related companies which provide services or products relevant to the provision of your super, any relevant government authority that requires your personal information to be disclosed, and our other service providers used to assist with managing your super.

In managing your super your personal information will be disclosed to service providers in another country, most likely to Mercer's processing centre in India. Our Privacy Policy lists all other relevant offshore locations.

Our Privacy Policy sets out in more detail 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 also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact us on **1300 963 720** or write to the Privacy Officer, MyLife MyPension, GPO BOX 4303, Melbourne, VIC 3001.

## Step 5 – Sign the form

By signing this form:

- I have read and understood this form
- I understand that the information contained in this form will be handled by the trustee to process my pension payment variation
- I understand and consent to my information being collected, disclosed and used in the manner set out in this form.

Signature

Date

X

/   /

**Please return your completed form to MyLife MyPension, GPO Box 4303, Melbourne VIC 3001.**

