

Change of member details – Retirement Income

Did you know that you can update your details online? Log in to Member Online at login.aware.com.au and select 'My details'.

Use this form to change your membership details or the way you receive information from the fund.

This form can also be used to change your membership details if you are a Term Allocated Pension (TAP) or Retirement Transition account holder.

Please use a dark pen and CAPITAL letters. Insert (X) when you have to choose an option. If you have any questions, please contact our Member Support Team on **1300 650 873**.

Step 1: Provide your current membership details

Please record your current membership details before you update information in **Step 2**.

Account number*

Member number*

Title

Date of birth* (DD-MM-YYYY)

First name*

Middle name

Last name*

Home address* (must not be a PO Box)

Suburb*

State*

Postcode*

Country*

Mobile number*

Step 2: Update your information

You must provide proof of identity if you have requested any of the following:

- Change your name
- Change your bank account details
- Nominate your investment account for internal transfer
- Update your mobile number
- Update your address to overseas

See **Proof of identity** in the **Notes**.

Title

Gender

☐ Male ☐ Female ☐ Intersex or indeterminate ☐ Prefer not to say

First name

Middle name

Last name

Home address (must not be a PO Box)

Suburb

State

Postcode

Country

* Indicates that providing this information is mandatory. Not doing so may delay the processing of your request.

You only need to complete the sections where your details have changed.

If you are providing an overseas address you must also provide proof of identity that verifies your address. For more information, see 'Overseas residents' on **Notes** page.

Step 2: Update your information (continued)

Postal address (if different from your home address)

Suburb

State

Postcode

Mobile number

Daytime contact number

Tax File Number (TFN)



It isn't compulsory to provide your TFN but if you don't, you may pay additional taxes.

There is no requirement for you to provide your TFN and failing to do so is not an offence. However, if you do not provide your TFN, the taxable component of any withdrawals you make from your super account before age 60 will have tax withheld at the top marginal tax rate plus Medicare levy. Choosing to quote your TFN would also make it easier to keep track of your superannuation in the future.

Under the Superannuation Industry (Supervision) Act 1993, we are authorised to collect your TFN, which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change. Your TFN may be disclosed to another superannuation provider, when your benefits are being transferred, unless you request in writing that your TFN not be disclosed.

Email (Providing a personal email address rather than a work email address ensures we can contact you even if you change employers.)

By providing my email address I'm consenting to receive communications from Aware Super digitally as appropriate and in accordance with Aware Super's Privacy Policy. I understand I can change my communication preferences at any time by logging into Member Online or calling Aware Super on **1300 650 873**.



If you have selected proof of identification for electronic verification to **change your name after marriage**, please also include a certified copy of your Marriage certificate or Certificate of registration. See the **Notes**.

Step 3: Provide proof of identity

Please complete (X) one of the options below.

- ☐ I have previously provided certified proof of identity documents or provided the electronic verification information below to Aware Super and I am not changing my name, date of birth or mobile phone number, providing bank details for the first time or changing a previously nominated bank account.

- ☐ I will provide proof of identification for electronic verification.

Please provide any TWO of the following:

1. Full name **exactly** as it appears on my Medicare card

My Medicare number is

Valid to (MM-YYYY)

My reference number on this card is

Select your Medicare card colour

☐

Green

☐

Blue

☐

Yellow

2. Full name **exactly** as appears on my driver's licence[#]

Licence number

Licence card number

State of issue

Expiry date (DD-MM-YYYY)

3. My **Australian** passport number is

Place of birth (as shown on your passport)

Country of birth (not shown on your passport)

Family name at birth (not shown on your passport)

- ☐ I will provide original, certified proof of identity (POI) documents. For a list of POI documents and certification guidelines, refer to the **Notes** section. If my POI documents have not been certified correctly, I understand Aware Super may use the information on the documents to verify my identity electronically using independent data sources.

[#] If providing your driver's licence details in this step, your driver's licence number and driver's licence card number must be provided for Aware Super to complete Proof of Identification checks for those Australian States and Territories where the card number is a mandated requirement. Visit [aware.com.au/verify](https://www.aware.com.au/verify) for further information on whether your State/Territory has this as a mandated requirement.



Complete this step to change the amount and frequency of your income payments to your nominated bank account.



For Retirement Income account members who received a Retirement Bonus

If you withdraw 50% or more of your opening balance within 12 months of opening your Retirement Income account, we reserve the right to deduct the Retirement Bonus from your Retirement Income account, excluding any funds withdrawn due to death, permanent incapacity or terminal illness. Withdrawals include lump sum payments, rollovers, regular income payments, and one-off income payments.



Indexation is not available if you choose the minimum or maximum amount.

Step 4: Income payment details

4.1 How often would you like to receive income payments?

Please mark (X) to indicate how often you wish to receive your income payments – select one choice only:

- ☐ Fortnightly ☐ Monthly ☐ Quarterly
☐ Half-yearly ☐ Annually

Other than fortnightly payments, payments are processed on the 13th day of the month (as relevant). Once processed, your payment will take a minimum of two business days to reach your bank account. If your payment date falls on a weekend or public holiday, your payment will be processed on the business day prior. For more information, read the 'Starting a Retirement Income account' section of the PDS.

If you don't select a payment frequency, your income payments will be paid monthly and from the next available payment date.

4.2 What month do you want your first payment to be made?

Please nominate starting month for payment
 (For example 'MARCH')

4.3 How much would you like to receive?

Please mark (X) to indicate how much you wish to receive – select one choice only:

- Minimum and maximum income payment amounts are based on government limits as well as your age. For current limits, refer to the 'Starting a Retirement Income account' section in the PDS.
- Payments for your first year will be pro-rated, based on the number of days from when your account is open and the following 1 July.

- ☐ Minimum payment amount
☐ Specific amount per payment
☐ Specific amount per annum

\$

\$

- ☐ Maximum payment amount (this applies to Retirement Transition accounts only)

If you have nominated a specific amount: Would you like this nominated amount to be automatically indexed in line with CPI (Consumer Price Index) on 1 July each year?

☐ Yes ☐ No

If you wish for your payment to be paid to your bank account, please complete **Step 5**.

If you wish to have your payment paid to your investment fund, please complete **Step 6**.

Step 5: Update your bank account details

- We are required to obtain and verify proof of identity before we can change your bank account details, in accordance with the Aware Super AML/CTF Program.
- The trustee cannot be held liable for any errors that occur based on the account details you have provided.
- Deposits can only be made into an account held in your name or jointly in your name.

You must provide proof of identity if you are providing the below bank details for the first time.

Account holder name/s

Branch (BSB) number

Australian bank account number

Name of bank or financial institution

Branch location

i The details provided here in Step 6, cannot be updated or provided online.

Step 6: Nominate your investment account for pension payments

- We are required to obtain and verify proof of identity before we can update your record to pay your regular pension payment directly to your nominated Aware investment fund account.
- The trustee cannot be held liable for any errors that occur based on the account details you have provided.
- Deposits can only be made into an account held in your name or jointly in your name.

You must provide proof of identity in Step 3 if you are providing the below account details for the first time.

Account holder name/s

Account number (Investment fund accounts only)

i Complete this step to change to the new payment rules if you commenced your account prior to 1 July 2007, and have not previously changed to the new payment rules.

Step 7: Change to the new payment rules

I have read the *Retirement Income Product Disclosure Statement (PDS)* and understand the implications for my account of moving to the new payment rules. I also understand that once I move to the new payment rules I cannot elect to change back to the old rules.

☐ Yes, please change my Retirement Income to the new payment rules

Step 8: Read our privacy information

The personal information provided on this form is collected and held by Aware Super, in accordance with the Australian Privacy Principles of the *Privacy Act 1988* (Cth), for the purpose of administering accounts, assessing claims and providing services associated with fund membership. For further information about how personal information is handled, please call us on **1300 650 873** or visit **aware.com.au/privacy** to view the privacy policy (a hard copy of the policy may also be provided on request). The policy contains information about access to and correction of personal information, how a complaint can be made about a privacy breach and other important information about how personal information is collected, used and disclosed.

Step 9: Declaration

I certify that:

- I have fully read this form and the explanatory notes and the information completed is true and correct.
- The changes on this form are irrevocable and binding until I make further changes.
- I have read, understood and accept the Aware Super privacy policy.
- I acknowledge that the Fund may require additional proof of identity in certain circumstances under the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*.
- I understand payments cannot be made from funds invested in a Term Deposit.
- I have fully read the *Retirement Income Product Disclosure Statement (PDS)* and understand that this form is not personal advice.
- I authorise the use of my personal details, above, for the purpose of electronic data verification. I understand that my information will be used to verify my identity electronically using independent data sources.

Signature*

Date signed* (DD-MM-YYYY)

i Please sign and date form here.

e Upload or post the form to us.

Step 10: How to send us your completed form

Upload clear copies of your completed form and supporting documents via our website at **aware.com.au/upload**. Acceptable file formats are **pdf, jpeg, jpg** and **png**.

OR

Please post the completed form to:

**Aware Super
GPO Box 89
MELBOURNE VIC 3001**

In case you need any further assistance, please contact our Member Support Team on **1300 650 873**.

Proof of identity

Change of name

If you have changed your name, you must provide a certified copy of one of the following name change documents:

- marriage certificate or certificate of registration (if you are on the relationship register) issued by the Births, Deaths and Marriages Registration Office (ceremonial certificates cannot be accepted)
- deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office. If you have reverted to your maiden name, we will require your marriage certificate (from the Births, Deaths and Marriages Registration Office) showing your original maiden name and your married name.

Change of bank account details OR Nominate Investment Fund account

You need to provide proof of identity documents when setting up, updating the bank account you're nominating to receive payments into or providing an account holder name/s and/or account number for your investment account for the first time. You can provide your identification for electronic verification in the proof of identity step of this form. Alternatively, you can provide certified proof of identity, refer to the acceptable documents list below.

Acceptable documents and certification

Providing electronic proof of your identity

To verify your identity electronically, you can provide two government-issued identification documents – such as your Australian Passport, Driver's Licence and Medicare Card within the proof of identify step of this form. Alternatively, you must provide certified proof of identity document(s). Refer to the acceptable documents list below.

Providing certified proof of your identity is a three-step process:

- 1 Collect your originals**
Collect your proof of identity document(s). We have listed the documents you can use below.
- 2 Photocopy your originals**
- 3 Have your copies certified**
Take your copies and your original documents to a person who can certify documents. A list of authorised certifiers and certification guidelines is included under **Certification of personal documents**.

You can provide:

Either:

A certified copy of one of the following documents:

- A current drivers licence with a photograph, issued in Australia or under the authority of a foreign country.*
- An Australian passport (if expiry is less than 2 years old)
- A current Australian state/territory proof of age card containing your photograph
- A current passport, similar travel document or national identity card issued by a foreign government department, the UN or an agency of the UN, containing your photograph and either your signature or a unique identifier*

Or:

One certified document from this list:

- A birth certificate issued by a state or territory of Australia, by a foreign government, or by the United Nations or an agency of the United Nations*
- A citizenship certificate issued by the Commonwealth or a foreign government*
- A current Centrelink pension card that entitles you to receive financial benefits

AND One certified document from this list:

- A notice issued by the ATO within the last 12 months that shows your name and current residential address and records an amount payable to or by you e.g. your last tax assessment
- A notice issued by a local council or utilities provider in the last three months showing the provision of services to you and your current residential address e.g. rates notice, electricity or water bill
- A notice issued by the Commonwealth or a state or territory government within the last 12 months showing your name and current residential address and the provision of financial benefits to you e.g. Centrelink letter
- If you're under 18, you can provide a student card, or a letter from a school principal. The letter must include the date it was issued (within three months of providing your proof of ID), your name, residential address and the dates you attended the school.

*If the document and/or the certification is not written in English, it must be accompanied by an English translation prepared by a translator accredited by the National Accreditation Authority for Translators and Interpreters Ltd (NAATI). If you are unable to provide these documents, please call us to discuss alternatives.

Certification of personal documents

All copied pages of original personal identity documents (including any change of name documents) must be certified as true copies by an authorised person with the appropriate qualifications or registration (see below) who cannot be the owner or addressee of the document. The authorised person must sight the original and the copy to ensure the documents are identical, then certify each page by writing "I certify that this document is a true copy of the original", followed by their signature, printed name, address, qualification (e.g. justice of the peace, Australia Post employee), registration number (if applicable) and date.

If you are in Australia

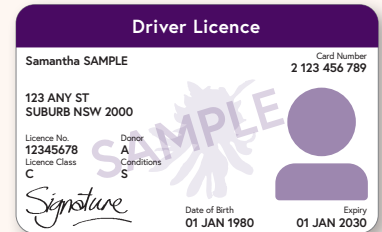
The following lists a subset of people who are authorised to witness your signature on a statutory declaration as well as certify copies of original documents. For a complete list of authorised witnesses/certifiers, go to the Attorney-General's Department website at www.ag.gov.au.

- Australia Post employee in charge of an office providing postal services (charges may apply)
- chiropractor
- dentist
- Financial adviser or financial planner
- full-time or part-time teacher employed at a school or tertiary institution
- justice of the peace
- legal practitioner
- magistrate
- medical practitioner
- nurse
- optometrist
- pharmacist
- physiotherapist
- police officer
- psychologist
- veterinary surgeon

Samantha Sample has provided a copy of her identification. It includes her **signature, full name, date of birth and current residential address**.

The authorised person has sighted the original identification and confirmed that the copy is a true copy.

Details for the authorised person to include are full name, address, qualification, registration number (if applicable), date and signature.



I certify that this document is a true copy of the original.

K Anderson

Name: Kate Anderson

Address: 6 Some St Suburb NSW 2000

Qualification: JP

Registration no: 123456

Date: 1 October 2023

i If you are providing a certified copy of your driver's licence, please ensure this copy contains the card number which may be located on the back of your card.

If you are outside Australia

The following people can certify copies of the originals:

- consular staff at an Australia Embassy, High Commission or Consulate
- a public notary or other person authorised to administer an oath or affirmation or to authenticate documents in the country you are visiting or living in.

The professions listed under **If you are in Australia** can only certify documents outside Australia if they work or are registered in Australia. Where your documents are certified outside Australia, the certifier must quote their registration number or the relevant law that qualifies them to authenticate your documents.

Overseas residents

If you change your address to an overseas address, reside overseas or direct Aware Super to make your payment to an overseas address, you must provide verification proof.

What proof of identity information must be provided?

A passport issued by the Commonwealth,

OR

A passport or a similar document issued for the purpose of international travel, that:

- contains a photograph and the signature of the person in whose name the document is issued
- is issued by a foreign government, the United Nations or an agency of the United Nations, and
- if it is written in a language that is not understood by the person carrying out the verification, is accompanied by an English translation prepared by an accredited translator.

AND

one of the following:

- a licence or permit issued under the law or equivalent authority of a foreign country for the purpose of driving a vehicle that contains a photograph of the person in whose name the document is issued and contains their residential address, or
- a notice that:
 - was issued to an individual by a local government body or utilities provider within the preceding three months
 - contains the name of the individual and his or her residential address, and
 - records the provision of services by that local government body or utilities provider to that address or to that person.