



QSuper Pension account change of details



What do I use this form for?

Complete this form if you need to change any of your QSuper Pension account details. Please complete in dark blue or black ink.

PART A PERSONAL DETAILS

Account number:

Title: Mr Mrs Miss Ms Dr

Surname:

Given names:

Postal address:

State: Postcode:

Residential address: Same as above Different (please provide below)

State: Postcode:

Previous name¹:

Date of birth: / / (dd/mm/yyyy)

Phone number (home):

(work):

(mobile):

Email address:

¹ If your name has changed since you last had contact with QSuper, please contact us for information on the additional documents you will need to provide.

PAYMENT INFORMATION

Pension payments can **only** be made to your personal bank or credit union account. They cannot be made to a business or loan account.

Neither QSuper nor your bank or credit union can accept responsibility for any delay or loss of interest caused by incorrect details on this form.

PART B BANK OR CREDIT UNION ACCOUNT DETAILS

Please change my personal bank or credit union details to the following.

To ensure the security of your benefits, we require a copy of your bank or credit union statement that shows your full name, address, and account details. **We cannot process your request without this.**

Name of bank or credit union:

Account name:

Account number:



Branch name:

Address:


Branch (BSB) number: (available from your bank or credit union)

QSuper Pension account change of details

IMPORTANT NOTICE:

-  Your new pension payment amount for the current financial year should be at least the minimum amount allowable. If you have a transition to retirement option, the maximum allowable pension is 10% of the balance at 1 July or balance at the date of commencement. The maximum allowable pension is not calculated on a pro-rata basis.
-  On 13 March 2009 the Commonwealth Government passed legislation to provide a temporary relief from the minimum pension drawdown requirements for the 2008/2009 financial year. The Government has continued this relief for the 2009/2010 financial year.

PLEASE NOTE:

-  Only one reversionary beneficiary can be elected. A reversionary beneficiary can only be your spouse, child, or a financial dependant with whom you are in an interdependent relationship. You should read *Nominating a reversionary beneficiary* in the product disclosure statement for the QSuper Pension account.

PART C PENSION PAYMENT DETAILS – PLEASE REFER TO IMPORTANT NOTICE

Please change my gross pension payment details to the following (from the next available pension payment).

AMOUNT OF GROSS INCOME PAYMENT

Temporary relief of minimum drawdown¹ Minimum Maximum²

Other \$
Please specify dollar amount per payment

If no election is made, it will be assumed you have elected the minimum amount as prescribed by current Commonwealth regulations.

1 Choosing this option means you are electing to receive 50% of the minimum pension drawdown requirement. If you select the temporary relief of minimum drawdown, and it does not apply, it will be assumed you have elected the minimum amount as prescribed by current Commonwealth regulations.

2 Transition to retirement only.

PER FREQUENCY OF INCOME PAYMENT

Monthly Quarterly³ Half-yearly³ Annually³
Month

3 If you have chosen to receive your income payments annually, please nominate the month you want to receive your payments in the box provided. If you have chosen to receive income payments quarterly or half-yearly, please indicate the month in which the first payment is to be made. Where no choice is made, it will be assumed you have chosen to be paid on a monthly basis.

PART D CHANGE OF DETAILS FOR PAYMENT OF BENEFIT ON DEATH

The nomination of a reversionary beneficiary is important for tax and social security implications. It is recommended you seek personal financial advice before choosing this option. Although not compulsory, if you nominate a reversionary beneficiary, it must be in accordance with Commonwealth legislation and is not binding on the QSuper Board.

I nominate a reversionary beneficiary to receive the remaining balance of my QSuper Pension account in the event of my death.

Title: Mr Mrs Miss Ms Dr

Surname:

Given names:

Postal address:

State: Postcode:

Phone number (home): (work):

(mobile):

Email address:

Date of birth: / / (dd/mm/yyyy)

Relationship to you:

QSuper Pension account change of details

PLEASE NOTE:

The QSuper Board is committed to complying with the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*. In line with QSuper's anti-money laundering and counter-terrorism program, we require identification details with any claim you initiate on your QSuper account or as part of a claim as a beneficiary of a QSuper member's account. If you are acting on behalf of a QSuper member (e.g. under a power of attorney), both you and the QSuper member must supply identification as described in this section of the form. A certified copy of the power of attorney is also required.

If you are taking care of the member's affairs due to a power of attorney or an enduring power of attorney, you need to supply us with an original or a copy of this document, certified as a true and complete copy of the original under the *Powers of Attorney Act 1998*. This certification can be done by a justice of the peace, commissioner for declarations, lawyer, or notary public. Original documents will be returned to you once the application has been finalised.

PART E IDENTIFICATION REQUIREMENTS

For your details to be updated, you must provide a **certified copy** of one of the following current documents, which contains your name, photograph, and either date of birth or residential address.

Please indicate which document you have attached:

- a driver's licence
- an Australian passport (or one which has expired within the last two years)
- a Proof of Age Card issued under an Australian State or Territory
- a foreign passport or similar travel document containing both a photograph and your signature (any documents written in a foreign language must be accompanied by an English translation prepared by an accredited translator).

If you are unable to provide any of the above documents, please contact the QSuper Contact Centre on 1300 360 750 for information on other documents you may provide to verify your identity.

See below for certification procedures and a list of approved certifiers.

PART F DECLARATION AND AUTHORISATION

- I declare I [am the person named on this form/have a power of attorney to act on the member's behalf]¹.
- I declare I have read and understood the QSuper Pension account product disclosure statement and the notes on this form.
- I request payment to be made in the manner indicated on this form.
- I declare the information given on this form is true and correct.
- I have supplied the necessary documentation to comply with the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*, as outlined above in Part E of this form.
- I understand that if I have elected to take the temporary relief of minimum drawdown option and the legislation does not apply for the current financial year, QSuper may need to make a catch up payment for the end of financial year.

¹ Cross out whichever is not applicable

(Signature)

 SIGN HERE

(Date – dd/mm/yyyy)

/ /

CERTIFICATION PROCEDURE

- Take the original and a copy of your selected documents to an acceptable certifier (see list to the right) who will verify that the original documents have been sighted.
- Ensure that the certifier sights the original and signs the copy, confirming it is a true copy of the original. The certifier must also include their name, the date of certification, and their certifying designation from the list of acceptable certifiers.
- Post this form and the certified copy of your identification to QSuper. We cannot accept facsimiles or copies of the certified documents. Please do not send us your original documents.

WHO TO SEE

CONDITIONS AND DEFINITIONS

Australia Post	An agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public; or a permanent employee of the Australian Postal Corporation with two or more years of continuous service who is employed in an office supplying postal services to the public.
Banking and other financial institutions	An officer with two or more continuous years of service with one or more financial institutions or a finance company officer with two or more continuous years of service with one or more financial companies.
Justice of the peace or notary public	An individual appointed by the courts whose duties include certifying documents.
Legal professionals/ law enforcement	A person who is enrolled on the roll of the Supreme Court of a State or Territory, or High Court of Australia, as a legal practitioner. Other professionals include a judge of a court, a magistrate, a chief executive officer of a Commonwealth court, a registrar or a deputy registrar of a court, or a police officer.
Accountants	A member of the Institute of Chartered Accountants in Australia, CPA Australia, or the National Institute of Accountants, with two or more years of continuous membership.
Consular or Diplomatic Officer	An Australian Consular Officer or an Australian Diplomatic Officer.

Contacting QSuper

Contact Centres

70 Eagle Street Brisbane

63 George Street Brisbane

1300 360 750 (+617 3239 1004 if overseas)

Monday to Thursday 8.30am to 5.00pm

Friday 9.00am to 5.00pm

GPO Box 200
Brisbane Qld 4001
Fax 07 3239 1121

qsuper.qld.gov.au

ABN: 60 905 115 063
SFN: 2610 419 41

The privacy of your personal information is important to us. We are collecting this information to administer your superannuation account. If you would like further information about our privacy policy, you can download QSuper's *Your privacy* fact sheet from our website. Alternatively, call us and we will send you a copy.