

Update an Income Account and/or Lifetime Pension

(including Transition to Retirement (TTR))

When to use this form

Complete this form to update your Income account and/or Lifetime Pension details. Once you've provided your personal details, you only need to complete the sections that are relevant to you. If you'd like to change your investment options, you should visit Member Online to make a switch, or complete the Switch Investments in an Income Account form available at qsuper.qld.gov.au/forms

Please complete in **BLOCK** letters, in blue or black ink.

1 Personal details

Client number

You can find your client number on your annual statement or by logging in to Member Online.

Title

First name

Last name

Previous name (if we know you by another name)

Date of birth (dd/mm/yyyy)

 / /

Home phone number

Mobile phone number

Work phone number

Email address

Residential address

State

Postcode

Postal address

☐ As above

State

Postcode

2 Accounts to update

If you have more than one Income account and/or Lifetime Pension, you can specify which account you want to update.

☐

Income account number

AND/
OR

☐

Lifetime Pension number

OR

☐

All of my accounts

3 Which bank account do you want your payments to go into?

Complete this section to change the bank account we make your payments to.

We can make payments into a bank, credit union, or building society account that's in your name or a joint name. This means we can't make payments to a business account. Please make sure you give us the correct details, because if we don't have them, there could be a delay in your payment or a loss of interest. The Trustee doesn't accept responsibility if this happens.

Bank name

Branch (BSB) number

Account

Account name

For members wanting to make changes to a Lifetime Pension, please only complete sections 8 to 11.



Part of Australian Retirement Trust

4 Recently retired or stopped working?

Complete this section if you have a Transition to Retirement Income account and your employment status has recently changed.

☐ I've permanently retired, or my employment arrangements ended on or after turning 60.

5 Your Income account payments

Complete this section to change your Income account payment amount. We'll make payments at the same frequency you have set up, or at the new frequency you tell us in section 6.

☐ **Minimum amount I am allowed**

OR

☐ **Maximum amount I am allowed**

(A maximum withdrawal amount of 10% only applies to a TTR Income account.)

OR

☐ **Specified gross amount:**

\$

OR ☐ Increase my payments each July in line with inflation using the Pensioner and Beneficiary Living Cost Index (ABS).

6 Frequency of Income account payments

Complete this section to change the frequency of your Income account payments (please note that Lifetime Pension payment frequency cannot be changed).

Tell us below when you'd like to receive your income payments. Keep in mind we make fortnightly payments on Wednesdays and all other payments on the 28th of the month.

☐ Fortnightly ☐ Monthly ☐ Quarterly

☐ Half yearly ☐ Yearly

Tell us the month you'd like the first payment, or write NEXT for the next available payment.

We'll do our best to update your account details within three working days after receiving your form, so your new payment frequency should start in the next pay cycle you've chosen.

7 Planning your estate

Complete this section to change or nominate a reversionary beneficiary. If you have an Income account, this is the person who receives the money in your Income account when you pass away. You should know that we'll pause any payments between the time we're notified of your death, and we process the death benefit claim.

If you want more information about estate planning, please read the Product Disclosure Statement for Income Account and Lifetime Pension available at qsuper.qld.gov.au/pds. It's also a good idea to get financial advice before you make or change a nomination, as there may be financial or tax implications.

- ☐ I want to cancel my nomination and have no reversionary beneficiary.
- OR
- ☐ I want to nominate a reversionary beneficiary or change my nomination to the person below.

Title Given names

Surname

☐ Male ☐ Female

Date of birth (dd/mm/yyyy)

/ /

Phone number

Email address

Residential address

State Postcode

Relationship

- ☐ Spouse
- ☐ Child – under 18
- ☐ Interdependent
- ☐ Child – disabled (any age)
- ☐ Financial dependant (someone other than a child)
- ☐ Child – under 25 (financial dependant)

Remember, you're not required to nominate someone. If you do, the person you nominate needs to meet the relationship definition at the time of your death for the nomination to be valid. Read more about this in the Product Disclosure Statement for Income Account and Lifetime Pension at qsuper.qld.gov.au/pds

8 Remove Spouse Protection option from your Lifetime Pension

If your spouse passes away before you do, or you separate from your spouse, you can remove the spouse protection option from your Lifetime Pension. To remove the spouse protection option, you will need to attach evidence (death certificate, formal divorce confirmation) to this form to prove that you are no longer with your spouse.

If you choose to remove the spouse protection option, you will continue to receive payments for the rest of your life at the spouse rate. Keep in mind that you cannot add a new spouse beneficiary to an existing Lifetime Pension.

- ☐ I want to remove the spouse protection option from my Lifetime Pension.

9 Notifying Centrelink or Veterans' Affairs of your payments

- ☐ Please tick if you'd like to receive an income schedule that you can give to Centrelink or the Department of Veterans' Affairs to let them know about your payments.

10 Checking your attachments

- ☐ If we know you by another name, please attach certified copies of your marriage certificate or another legal change of name document.
- ☐ If you are removing the spouse protection option from your Lifetime Pension, please attach evidence such as certified copies of a death certificate, or in the case of a separation, a formal divorce confirmation.
- ☐ If signing as a power of attorney and you have not previously submitted this, please attach a certified copy of the power of attorney documentation.

You must also complete proof of identity requirements for you and the member (read the Proof of identity factsheet for more details).

If you'd like more information on how to get certified copies, or to check the evidence required, head to our website at qsuper.qld.gov.au/factsheets and read the Proof of identity factsheet.

11 Declaration and authorisation

- I am the person named on this form or have a power of attorney to act on the member's behalf.
- I declare all information provided in this form is true and correct.

Name

Signature

Date signed (dd/mm/yyyy)

 / /

What to do next

Once you've completed your form and attached all the necessary documents, send them to us.

Post

QSuper
GPO Box 200
Brisbane QLD 4001

Email

qsuper@qsuper.qld.gov.au

We're here to help you

If you have any questions about how to fill in this form, please call us on **1300 360 750** or get in touch online at qsuper.qld.gov.au/contact-us

You can also update your Income account payments at any time in Member Online. Log in or register at memberonline.qsuper.qld.gov.au

Member Centres

Visit qsuper.qld.gov.au/membercentres for locations

Member Services team

Phone 1300 360 750
Overseas +61 7 3239 1004
Monday to Friday 8.00am – 6.00pm (AEST)

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Email qsuper@qsuper.qld.gov.au
Fax 1300 242 070
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