# Update an Income Account

## Includes transition to retirement (TTR)

Update your income account details

## When should I use this form?

Complete this form to update your Income account 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 complete the *Switch Investments in an Income Account* form available on our website.

## 1 Personal Details

Client number

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

Title

Given names

Surname

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 Income account to update

If you have more than one Income account, you can specify which account you want to update.

◯ Income account number

OR

◯ All of my Income accounts.

## 3 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 I'm over 60 and stopped working.

## 4 Frequency of income payments

Complete this section to change the frequency of your Income account payments. Tell us below when you'd like to receive your income payments. Keep in mind we make fortnightly payments on Wednesdays and we make 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 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.

QSuper®
GROWING YOUR SUPER TOGETHER

## 5 Income payment amount

Complete this section to change your payment amount. We'll make payments at the same frequency you have set up (or at the frequency you told us in section 4). You can find out more about minimum and maximum payments amounts in the *Income Account Guide* on our website.

- ◯ Minimum amount permitted under legislation.

OR

- ◯ Maximum amount permitted under legislation **(transition to retirement only)**.

OR

- ◯ Specific amount

Increase my payment amount each July with inflation using the Pensioner and Beneficiary Living Cost Index.

◯ Yes ◯ No

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

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

So you know, we can only 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. We can't accept responsibility if this happens.

Bank name

Branch (BSB) number

Account number

Account name

## 7 Planning your estate

Complete this section to change or nominate a reversionary beneficiary (the person who receives the money in your Income account when you pass away). And if you want more info on estate planning (and how a reversionary beneficiary works) please read the *Income Account Guide* available on our website. It's also a good idea to get financial advice before you make a nomination because there might be some financial or tax implications.

- ◯ I want to cancel my nomination and have no reversionary beneficiary.

OR

- ◯ I want to make a nomination or change my nomination to the person below.

**Reversionary beneficiary details**

Title

Given names

Surname

Gender

◯ Male ◯ Female

Date of birth (dd/mm/yyyy)

Phone number

Email address

Address

State

Postcode

**Relationship**

| | |
|---|---|
| ◯ Spouse | ◯ Child – under 18 |
| ◯ Interdependent | ◯ Child – disabled |
| ◯ 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 *Income Account Guide* on our website.

## 8 Notifying Centrelink/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.

## 9 Checking your attachments

If you'd like more info on how to get certified copies, or to check the evidence required, head to our website at **qsuper.qld.gov.au** and read the *Proving Your Identity* factsheet.

○ **If we know you by another name,** please attach certified copies of your marriage certificate or another legal change of name document.

○ **If you're signing as a power of attorney and you haven't already given us a certified copy of your power of attorney documentation,** please attach it to this form.

## 10 Declaration and authorisation

- I'm the person named on this form or have a power of attorney to act on the member's behalf.
- The information I've given on this form is true and correct.

Name

Signature

Date (dd/mm/yyyy)

## What should I do next?

Once you've completed your form and attached all the necessary documents, send them to us at QSuper, GPO Box 200, Brisbane Qld 4001, or via email qsuper@qsuper.qld.gov.au

## We're here to help you

To help you get the most out of your super, you might want to get some personal financial advice. QInvest offers personal financial advice services including 'one-off' simple advice about your QSuper benefit, through to comprehensive advice about your financial situation. Just call **1800 643 893** or visit **qinvest.com.au**

## Need more information?

To find new ways to get more out of your super, have a play around with the tools and calculators on our website at **qsuper.qld.gov.au**. You can experiment with as many different inputs and scenarios as you like.

And we're always here to help on the phone too. Just call us on **1300 360 750** to get in touch.

**Member Centres** 70 Eagle Street Brisbane and 63 George Street Brisbane
**Telephone** 1300 360 750 (+617 3239 1004 if overseas)
Monday to Thursday 8:30am to 5:00pm AEST
Friday 9:00am to 5:00pm AEST

**Postal address** GPO Box 200 Brisbane Qld 4001
**Fax** 1300 242 070
**Website** qsuper.qld.gov.au
**Email** qsuper@qsuper.qld.gov.au

ABN: 60 905 115 063
SFN: 2610 419 41
10595 01/07/17 FO15