

# Change of details form

## – pension members



### Save time, go online!

If you're a Flexi Pension or Term Allocated Pension member, the quickest way to update your details is through your online account. Log in at [unisuper.com.au](https://www.unisuper.com.au).

Use this form to update your personal details, update a non-binding beneficiary or to make changes to your income payments.

PART B of this form relates to your member details. Any changes you make in this section will be applied to each of your UniSuper accounts.

Any changes you make in the remaining PARTS (C, D, E, F and G) will be applied to the account nominated in PART A only. If you have more than one UniSuper account, you'll have to complete a separate *Change of details form - pension members* for each.

## PART A YOUR EXISTING MEMBER DETAILS

▶ Please complete in BLACK or BLUE BALL POINT PEN and print in CAPITAL LETTERS. Cross (X) where required.  
Complete everything in this section.

Account number

If you're unsure of your account number, refer to your most recent UniSuper correspondence or call us on **1800 331 685**.

Title

 Mr  Mrs  Ms  Dr  Professor  Other 

Surname

Given name(s)

This includes your first name and middle name(s).

Date of birth (DD/MM/YYYY)

What phone number can we call you on if we have a question about this form?

Daytime contact number

## PART B YOUR UPDATED MEMBER DETAILS

▶ Only update the details that are new or have changed.

If you're changing your name or date of birth, please attach a certified copy of the relevant documentation, e.g. marriage certificate, deed poll, birth certificate or passport. Refer to the *Your guide to proof of identity* fact sheet for information on which documents we can accept and how to verify your identity.

Please note: you can only update your sex at birth with us **once**. You're not required to provide any evidence to make this update.

Title

 Mr  Mrs  Ms  Dr  Professor  Other 

Surname

Given name(s)

This includes your first name and middle name(s).

Date of birth (DD/MM/YYYY)

Sex at birth\*  Male  Female

Daytime contact number

Email address

\* We're required to provide Services Australia with details about your income stream, including your sex at birth.



**PART B****CONTINUED**

Residential address (not PO Box)

Suburb/Town

State

Postcode

Country (if not Australia)

Is your postal address different from your residential address?

No.

Yes. Provide your postal address below.

Postal address (PO Box if applicable)

Suburb/Town

State

Postcode

Country (if not Australia)

**PART C****PROOF OF IDENTITY**Please choose **ONE** of the following options.

I will provide certified proof of identity (POI) documents, and also any required certified linking documents. For a list of POI documents and certification guidelines, refer to the *Your guide to proof of identity* fact sheet at the back of this form. If my identification documents have not been certified correctly, I understand UniSuper may use the information on the documents to verify my identity electronically using independent data sources.

I will provide my identification details below for UniSuper to complete electronic verification on my behalf and also any required certified linking documents, as specified in the *Your guide to proof of identity* fact sheet.

Please complete **ANY TWO** of the DRIVER'S LICENCE, MEDICARE or AUSTRALIAN PASSPORT options if you checked the second box above.

**OPTION 1 - DRIVER'S LICENCE**Full name **exactly** as appears on my driver's licence

Licence number

Driver's licence card number

State of issue

**OPTION 2 - MEDICARE**Full name **exactly** as it appears on my Medicare card

My Medicare number is

Card expiry date (MM/YYYY)

My reference number on this card is

Select your Medicare card colour

 Green Blue Yellow**OPTION 3 - AUSTRALIAN PASSPORT**Full name **exactly** as appears on my passportMy **Australian** passport number is

**PART D****INCOME PAYMENT DETAILS**

If you have a **Flexi Pension** or **Term Allocated Pension** and want to change your income payment details, complete this section.

Please note, to change the financial institution details for your income payments, complete the *Change of bank account details - pension members* form, available at [unisuper.com.au/forms](https://www.unisuper.com.au/forms).

**PAYMENT FREQUENCY**

If you want to change how often you receive your income payments, select **one** option from the choice below for your future payments.

How often do you wish to receive your income payments? (select **one** box only)

Fortnightly  Monthly  Quarterly\*  Half-yearly^

Annually. Which month would you like to receive your income payment?

January  February  March  April  May  June  
 July  August  September  October  November  December

\* Quarterly payments are made in March, June, September and December.

^ Half-yearly payments are made in June and December.

**PAYMENT AMOUNT**

I have a:

Retirement Phase or Beneficiary Income Stream (BIS) Flexi Pension\*

Transition to Retirement (TTR) Flexi Pension^

Term Allocated Pension (TAP)\*\*

Future income payments will be adjusted accordingly. Complete the **PAYMENT FREQUENCY** section above if you'd like to change your income payment frequency.

Minimum amount

OR

Maximum amount (TTR and TAP only)

OR

Specific amount per payment (e.g. monthly if you're paid monthly) \$

\* Your annual income must be at or above the minimum aged-based percentage of your account balance at the start of your Flexi Pension and then on each 1 July thereafter. Refer to the *Flexi Pension Product Disclosure Statement* for the minimum income you must take annually.

^ Your annual income must be between the minimum aged-based percentage and a maximum of 10% of your opening account balance at the start of your TTR Flexi Pension and then on each 1 July thereafter. Refer to the *Flexi Pension Product Disclosure Statement* available on our website for the minimum income you must take annually.

\*\*Your annual income must be between the minimum and maximum amounts set by the government. To calculate your minimum and maximum annual income, refer to the *How to calculate your Term Allocated Pension income* fact sheet, available on our website.

**> Flexi Pension and Term Allocated Pension members only to complete.**

If you want to choose how your income (and lump sum withdrawals) are drawn from your investment options, select from one of the following methods (select **one** only):

- Pro-rata** – Payments are drawn from the investment options in proportion to the balance in each investment option at the time of payment.
- Your choice** – Payments are drawn from the investment options in an order nominated by you. (Complete the section below.)
- Default order** – Your payments will be drawn from each of your investment options in the default order (this is the order shown in the list of options below).

If you don't make a choice, the default order shown in the list of options below applies.

**Drawdown – Your choice**

If you've selected 'Your choice', then order the investment options you want your income payments to be paid from (e.g. 1, 2, 3 etc.)

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> 1. Cash                  | <input type="checkbox"/> 7. Sustainable Balanced     | <input type="checkbox"/> 13. International Shares               |
| <input type="checkbox"/> 2. Australian Bond       | <input type="checkbox"/> 8. Growth                   | <input type="checkbox"/> 14. Global Environmental Opportunities |
| <input type="checkbox"/> 3. Conservative          | <input type="checkbox"/> 9. High Growth              | <input type="checkbox"/> 15. Australian Dividend Income         |
| <input type="checkbox"/> 4. Conservative Balanced | <input type="checkbox"/> 10. Sustainable High Growth | <input type="checkbox"/> 16. Global Companies in Asia           |
| <input type="checkbox"/> 5. Australian Income     | <input type="checkbox"/> 11. Listed Property         |   |
| <input type="checkbox"/> 6. Balanced              | <input type="checkbox"/> 12. Australian Shares       |   |

If you choose 'Pro-rata' or 'Your choice', once your selections have been exhausted, the default order will apply until you make a new selection.

It's important to review your drawdown order instructions from time to time because as income is drawn down, this will change how your remaining account balance is spread across your chosen investment options and reduce the degree of diversification.

Over time, the allocation of your remaining account balance between options may reflect a strategy which is very different from your original intentions. You should reconsider whether this is appropriate for your financial needs and circumstances.

**PART F****NON-BINDING BENEFICIARY NOMINATION**

Complete this section if you're a **Flexi Pension** or **Term Allocated Pension** member and want to make or change your non-binding beneficiary nomination.

If you have a Term Allocated Pension and have selected a reversionary beneficiary, you can't make a non-binding beneficiary nomination.

A non-binding beneficiary nomination allows you to nominate who you'd prefer your benefit to be paid to if you die. You can nominate one or more of your dependants and/or your legal personal representative. A non-binding beneficiary nomination is **not binding** on the Trustee, however it will be taken into account when the Trustee determines who will receive your benefit.

Refer to your UniSuper product disclosure statement (PDS) or [unisuper.com.au/beneficiaries](http://unisuper.com.au/beneficiaries) for more information.

If you'd like to make a binding death benefit nomination, read the *Binding death benefit nomination* fact sheet and form available from our website or by calling us.

Beneficiary nomination (select one box only):

**Make a new or update** my existing non-binding beneficiary nomination. Complete the fields in this section.

**Revoke** my existing non-binding beneficiary nomination. Go to PART G.

**For your nomination to be valid, the total percentage of your nomination must add up to 100%.**

**Beneficiary 1**

Surname

Given names

What is the percentage benefit you wish to nominate?

What is the beneficiary's relationship to you? (Select **one** box only) Spouse Child Financially dependent Interdependency relationship Legal personal representative (estate) %**Beneficiary 2**

Surname

Given names

What is the percentage benefit you wish to nominate?

What is the beneficiary's relationship to you? (Select **one** box only) Spouse Child Financially dependent Interdependency relationship Legal personal representative (estate) %

If you'd like to nominate more than two beneficiaries, attach the same details as above on a separate piece of paper, which is signed and dated in the same manner as this form.

Or you can log into your account on our website to make or update your non-binding beneficiary nomination.

➤ Please read this declaration before you sign and date this form.

- I declare that the information I've provided on this form is true and correct.
- I authorise the Trustee to update the details I have provided on this form for my account.
- I consent to my personal information being collected, used and disclosed in accordance with UniSuper's Privacy Statement and Policy.
- I have attached relevant certified proof of identity document(s) and/or I consent to my personal details being used electronically to verify my identity.

Signature

Date

<input type="text"/>	<input type="text"/>	<input type="text"/>
DD	MM	YYYY

### Return your form and proof of identity (if applicable):

UniSuper  
Level 1, 385 Bourke Street  
Melbourne Vic 3000

Please note that certified copies of your proof of identity documents must contain an original signature. As long as you consent for us to complete an electronic verification on your behalf, you can return your completed form to [pensionsmailbox@unisuper.com.au](mailto:pensionsmailbox@unisuper.com.au).

### Need help?

- Email [pensionsmailbox@unisuper.com.au](mailto:pensionsmailbox@unisuper.com.au)
- Call **1800 331 685**.

### PRIVACY STATEMENT

UniSuper is committed to protecting your personal information and the confidentiality of your information in accordance with privacy law obligations. The information that you provide to UniSuper on this form is collected and used in accordance with our Privacy Policy which can be found online at [unisuper.com.au/privacy](https://unisuper.com.au/privacy). If you have any privacy related questions, please call **1800 331 685**.

# Your guide to proof of identity

We take looking after your retirement savings very seriously—which is why you need to prove your identity (ID) before making withdrawals or other important changes to your account.

## Verify your identity online

Proving your identity online is quick and easy—you'll know as soon as your identity gets verified. Log in at [unisuper.com.au/memberonline](https://unisuper.com.au/memberonline) to get started. Only Australian residents with Australian documents currently living in Australia can verify their identity through their online account.

You'll need one or more of the following valid documents:

- Australian passport
- Australian visa
- Australian citizenship certificate
- Australian birth certificate
- Australian driver's licence
- Medicare card
- Centrelink card
- state and federal electoral roll details
- Notice of Assessment from the Australian Taxation Office (less than 12 months old) containing your name and residential address.

Make sure you've updated your current personal details with relevant government agencies before you begin the process of verifying your identity online. We use online government and public databases to securely verify your identity.

## Or send us certified copies of your ID

You can also send us certified copies of your ID. The following guide explains the types of documents we can accept and how to ensure they're correctly certified.

### ALLOW US TO VERIFY YOUR IDENTITY

In some cases and on some of our forms, we can verify your identity on your behalf if the document(s) you provide haven't been certified correctly or can't be read. All you need to do is give us consent and we'll try to verify your identity electronically using those documents. We'll let you know if the process wasn't successful.

### Why provide your TFN?

Giving us your tax file number (TFN) means we can process rollover and transfer requests to another super fund without additional proof of identity. If your TFN can't be validated, or you want to transfer to a self-managed super fund or organise a benefit payment, you'll still need to give us certified copies of your ID.

Visit [unisuper.com.au/memberonline](https://unisuper.com.au/memberonline) to provide your TFN online.

### STEP 1: COLLECT ACCEPTABLE DOCUMENTS

We'll accept either one document from List A or two documents from List B.

#### LIST A

##### A certified copy of a:

- current driver licence
- current passport (Australian passports that haven't expired more than two years ago are also acceptable).

##### State government-issued ID cards

We want it to be as convenient as possible for you to change or verify your details with us. You can provide a certified copy of the following valid state government-issued ID cards *instead of* your current driver licence or passport:

- Victorian proof of age card
- Queensland proof of age card
- South Australian proof of age card
- New South Wales photo card
- Western Australia photo card
- Tasmanian personal information card
- Australian Capital Territory (ACT) proof of identity card
- Northern Territory evidence of age card.

## LIST B

### A certified copy of a:

- birth certificate or birth extract
- Australian citizenship certificate
- a pension card issued by Centrelink that entitles the person to financial benefits.

### And:

- Notice of Assessment from the Australian Taxation Office (less than 12 months old) containing your name and residential address
- letter from Centrelink regarding a government assistance payment
- rates notice from local council (less than 12 months old) containing your name and residential address
- electricity, gas or water bill dated within the past three months that contains your name and residential address.

## STEP 2: CERTIFY YOUR DOCUMENTS

Take your original document(s) and a clear photocopy of both sides of the original document to an authorised person—we'll list who can authorise your documents below.

### Your ID must be properly certified

The authorised person will need to:

1. sight the original document, and the copy, to ensure both documents are identical, and
2. write or stamp 'this is a true and correct copy of the original document I have sighted' or 'certified true copy', followed by their:
  - signature
  - printed name
  - qualification (e.g. Magistrate), and
  - date.

If you've changed your name or are signing on behalf of another member, we require that you prove the 'link' between you and the name change, or other person. Use a certified copy of one of the following documents as well as your other certified ID.

PURPOSE	SUITABLE LINKING DOCUMENT
Change of name	<ul style="list-style-type: none"><li>▪ Marriage certificate</li><li>▪ Deed poll or change of name certificate from the Registry of Births, Deaths and Marriages</li></ul>
Signing on behalf of another member	<ul style="list-style-type: none"><li>▪ Power of Attorney</li><li>▪ Guardianship papers</li></ul>

When having your documents certified, remember:

- all pages must be certified
- the copy of the document must be certified—not on a separate page attached to the document
- certified copies of your documents must have an original signature
- faxed or emailed copies won't be accepted
- documents not written in English must be accompanied by an English translation prepared by an accredited translator
- documents certified more than a year ago won't be accepted.

## Who can certify your documents

Some of the people authorised to certify IDs include:

1. A person currently licensed or registered under a state or territory law to practise in one of the following occupations:
  - architect
  - nurse
  - chiropractor
  - occupational therapist
  - conveyancer
  - optometrist
  - dentist
  - patent or trade marks attorney
  - financial adviser or financial planner
  - pharmacist
  - legal practitioner
  - physiotherapist
  - medical practitioner
  - psychologist
  - midwife
  - veterinary surgeon.
2. One of the following persons:
  - teacher employed full-time at a school or tertiary education institution
  - agent of the Australian Postal Corporation who is in charge of, or a permanent employee with two or more years of continuous service with, an office supplying postal services to the public
  - bank, building society, credit union or finance company officer with two or more years of continuous service
  - clerk, master, registrar or deputy registrar of a court
  - judge of a court or a magistrate
  - justice of the peace
  - member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants, the Institute of Public Accountants or the Association of Taxation and Management Accountants, or a Fellow of the National Tax Accountants' Association
  - notary public, and
  - police officer.

## Members residing overseas

If you live overseas, the following people are authorised to certify identification documents:

- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the *Consular Fees Act 1955*)
- employee of the Commonwealth or the Australian Trade Commission who is authorised and exercising his or her function in a country or place outside Australia.
- a person authorised as a notary public in a foreign country.

Your documents must be certified by a person with an Australian connection. We won't accept certifications by someone licensed or registered to practise outside of Australia in an occupation listed above, or who holds a position in a foreign country—except for a foreign notary public.

## When will my form be processed?

If you've provided a correctly completed form (and any certified ID or other paperwork required), we'll aim to process your request as soon as possible. Not providing correct information may delay us processing your request. Please allow 3-5 business days for your form to arrive. We'll contact you if we have any queries in relation to your request.

This information is of a general nature only and includes general advice. It has been prepared without taking into account your individual objectives, financial situation or needs. Before making any decision in relation to your UniSuper membership, you should consider your personal circumstances, the relevant product disclosure statement for your membership category and whether to consult a licensed financial adviser. This information is current as at July 2023 and is based on our understanding of legislation at that date. Information is subject to change. To the extent that this fact sheet contains information which is inconsistent with the UniSuper Trust Deed and Regulations (together the Trust Deed), the Trust Deed will prevail. Issued by: UniSuper Management Pty Ltd ABN 91 006 961 799, AFSL No. 235907 on behalf of UniSuper Limited the trustee of UniSuper, Level 1, 385 Bourke Street, Melbourne Vic 3000.

Fund: UniSuper, ABN 91 385 943 850 | Trustee: UniSuper Limited, ABN 54 006 027 121 AFSL 492806 | Date: July 2023 UNIS000F80 0723