

# Pension change details

- Personal details (complete Sections 1, 2, 3 & 6)
- Investment options (complete Sections 1, 2, 4 & 6)
- Pension payment & drawdown options (complete Sections 1, 2, 5 & 6)

**This request will be invalid if unsigned by the member (see Section 6).**

Please use **BLOCK letters and black ink** when completing this form.

You should obtain and read a copy of the current *Pension Product Disclosure Statement (Pension PDS)* before you complete this form. The legalsuper *Pension PDS* and all forms that you may require are available free of charge at [legalsuper.com.au](http://legalsuper.com.au) or by calling **1800 060 312** (8am to 8pm [AEST] Monday to Friday).

You can make non-binding nominations online at [legalsuper.com.au](http://legalsuper.com.au) 'MemberAccess'.

**Return this completed form to:**

legalsuper pension  
 Locked Bag 5081  
 Parramatta NSW 2124  
 Phone: 1800 060 312

## 1. Pension member number

## 2. Previous contact details

 Mr  Mrs  Ms  Miss  Dr  Justice

Surname

Given Names

Date of birth (dd/mm/yyyy)

## 3(a). New contact details

If you wish to change the **date of birth** or **name** that is recorded in your personal details with legalsuper, you must provide a certified copy of documentary evidence such as a birth, marriage or deed poll certificate. Only fill in those details which have changed. Leave other parts blank.

 Mr  Mrs  Ms  Miss  Dr  Justice

Surname

Given Names

Date of birth (dd/mm/yyyy)

**NOTE:** If your date of birth was incorrectly supplied or incorrectly recorded this may affect the minimum or maximum pension requirements. If this should occur, legalsuper will take such action as may be required by legislation to rectify any pension payments.

## 3(b). New contact details

**You may make this change online via MemberAccess.**

Residential Address

Town or Suburb

State

Postcode

Postal Address (if different to Residential Address above)

Town or Suburb

State

Postcode

Telephone Number

Mobile Number

Email

#### 4. Change of investment profile

You can change your investment options online via MemberAccess.

You can invest in one investment option or any mix of investment options. **The percentage for each option can only be up to 2 decimal places and the total must add up to 100%.** Please refer to 'Your investment options' in the *Pension PDS*.

Please invest my pension as follows:

Investment Profile	% for each Investment Choice			
Cash		.		%
Enhanced Cash		.		%
Conservative		.		%
Conservative Balanced		.		%
Balanced Index		.		%
Balanced		.		%
Growth		.		%
High Growth		.		%
Australian Shares		.		%
Overseas Shares		.		%
Balanced Socially Responsible		.		%
<b>Total</b>	<b>100</b>	<b>0</b>	<b>0</b>	<b>%</b>

Applications for the Direct Investment Option (DIO) can only be made via MemberAccess at [legalsuper.com.au](http://legalsuper.com.au). Investment in the DIO is subject to investment minimums. Please refer to the *Pension PDS* for further details.

We recommend that you seek appropriately qualified professional advice if you need assistance in making an investment choice.

#### When an investment switch will occur

In the event that you elect to switch investment choices, your investment switch will occur using the next available unit price.

Requests to switch investment option(s) received before 4pm (AEST)\* on a National Business Day (i.e. a week day that is not a national public holiday or the NSW Queen's Birthday weekend or another day at the Trustee's discretion) will receive the unit price of that day.

Your account records will be updated two National Business Days after the request.

\* The 4pm (AEST) cut-off applies to requests received via all channels (e.g. online, forms).

The investment switch detail above does not include investments within the DIO, but does apply to transfers to and from the DIO.

**Any funds transferred from the DIO will be applied proportionately across your current investment option(s) selection.**

#### 5(a). Payment options

Pension payments cannot be made directly from any investment that you may have in the DIO. You must first sell your chosen DIO investment(s) and/or transfer excess DIO Cash account holdings in the DIO and transfer this amount to one of the non-DIO investment option(s) from which your pension can be paid.

I want to receive my pension payments:

- Fortnightly
- Monthly
- Quarterly (September/December/March/June)
- Half-yearly - in the months of  and   
(June and December apply if not specified)
- Yearly - in the month of   
(June applies if not specified)

Nominated date of first payment (dd/mm/yyyy)

**Note:** Fortnightly payments are processed according to the schedule on page 6 of the *Pension PDS*. Monthly, quarterly, half-yearly and yearly payments are processed on the 28th of the relevant month.

#### 5(b). Pension payment drawdown options

You have three options to choose for your pension to be paid to you:

- Option 1 (default):** Pension payments are paid proportionately across my Investment Profile selection as chosen at Section 4. If instead, you choose the following option 2 or 3 you must also complete the table that follows.
- Option 2:** Specify a different pension payment drawdown split by completing the table below - I want legalsuper to pay my pension amount in the following split of my Investment Profile selection.
- Option 3:** Specify the order of investment options that you would like your pension payment paid from by completing the table below - I want legalsuper to pay my pension amount in the following order of my Investment Profile selection.

#### Pension payment profile (for Option 2 or Option 3 only)

	Option 2: Pension payment split (%)	OR	Option 3: Pension payment order (#)
Cash			
Enhanced Cash			
Conservative			
Conservative Balanced			
Balanced Index			
Balanced			
Growth			
High Growth			
Australian Shares			
Overseas Shares			
Balanced Socially Responsible			
<b>Total (must total 100%)</b>	<b>100</b>	<b>0</b>	<b>0</b>

Please note that pension payments cannot be made directly from the DIO. You must first sell your chosen DIO investment(s) and/or transfer excess DIO Cash account holdings to one of the non-DIO investment option(s) from which your pension can be paid.

## Regular pension payment

(Please tick one box only)

The **minimum amount** per annum required under legislative guidelines

The **maximum amount** per annum allowed under legislative guidelines\*

A **nominated amount per payment** (subject to minimum/maximum legislative guidelines):

\$

\* There is no maximum amount unless you are receiving a Transition to Retirement pension.

### Pro-rata payments

If a pension is commenced prior to 1 June in a year, the minimum amount is automatically pro-rated by the number of days between date of commencement and the following 30 June.

For maximum pension payments that start after 1 July in a year, you can opt to have your maximum payment amount in a year paid pro-rata or not by ticking the applicable pro-rata payment box below:

Yes, pay pro-rata payment(s).

No, do not pay pro-rata payment(s).

**Note:** Pro-rata payment(s) apply/ies if nothing is specified in the boxes above.

### Payment instructions

Credit the following bank/building society/credit union:

Bank name/financial institution

Address of bank (suburb or town)

Account holder's name



BSB number

Account number

**Note:**

- Please provide a copy of your bank statement (not more than 12 months old) so we can verify that the above details you have provided are correct.
- legalsuper can only deposit amounts into an account held in your name or jointly in your name.

## 6. Declaration

The personal information that you have provided on this form will be used by legalsuper to change your account in accordance with your instructions. If you do not complete the sections as detailed on page 1 of this form, the Trustee will not be able to change the details as you have requested.

Information about how legalsuper uses and discloses the personal information that you provide is contained in the Fund's *Privacy Policy*. To access the Fund's *Privacy Policy* or your personal details or to make an enquiry about any aspect of your Fund membership, please call legalsuper on **1800 060 312** (8am to 8pm [AEST] Monday to Friday), visit legalsuper's website at **legalsuper.com.au** or write to legalsuper Pensions at Locked Bag 5081, Parramatta NSW 2124.

I acknowledge that:

- I have read the legalsuper *Pension PDS*.
- legalsuper will not implement any investment change instructions if they do not meet with the investment instructions detailed in Section 4.
- legalsuper is not responsible for my choice of investment strategy or my individual investment selection(s), or my pension payment drawdown option or my decisions as to whether or when to sell my investments.
- legalsuper is not responsible for any delays in implementing my instructions.
- I understand that legalsuper will confirm my instructions in writing.

I acknowledge that I should seek independent professional financial advice if I need assistance in understanding my pension options in completing this form.

Member's signature

Date (dd/mm/yyyy)