

CHANGE OF MEMBERSHIP DETAILS



Changed your name? Moved? Spotted something that's not right on your account?
Use this form to let us know.

Please select which scheme(s) you are a member of and enter your member number(s):

Accumulation Scheme

Member no.

Retirement Scheme

Member no.

Account-Based Pension Scheme

Member no.

Defined Benefit Scheme

Member no.

You can complete this form by typing directly onto it, or by using a black pen and capital letters. Use a (✓) to mark boxes.

Make sure you consider the relevant Product Disclosure Statement (PDS) available at activesuper.com.au/PDS before making a decision.

For simple changes that don't need certified documentation - like changing your address, you can update your details through Member Online.

It's quick and easy to register. Simply go to activesuper.com.au, click on the Member Online button and follow the prompts.

1. YOUR EXISTING DETAILS

Date of birth (DD MM YY)

Title (e.g. Ms)

Given name(s)

Family name

Email

Phone (home)

Phone (work)

Phone (mobile)

Postal Address

No./Street

Suburb/Town

State/Territory

Postcode

Residential address select if same as postal address above

No./Street

Suburb/Town

State/Territory

Postcode

If you've changed your name, you'll need to supply certified ID in your current name and a certified copy of one of the following documents that supports your name change:

- Marriage certificate
- Deed poll
- Change of name certificate from Births, Deaths and Marriages Registration Office.

Certified copy

A certified copy is a photocopy of the original document that has been sighted and signed by an authorised person as a true representative of the original.

You must provide a certified copy of one (1) of the following:

- birth certificate
- current driver's licence
- current passport
- certificate of Australian citizenship (if it contains your date of birth)

We are authorised to collect your tax file number (TFN) under the *Superannuation Industry (Supervision) Act 1993*. We will treat it as confidential and only use it for lawful purposes. This includes disclosing it to another super fund when we're arranging a transfer of funds for you.

You aren't obliged to disclose your TFN, but there may be implications if you don't.

Without it, your contributions may be taxed at a higher rate and we cannot accept after-tax contributions from you.

2. YOUR NEW DETAILS

Change of name New title/given name/s
New family name

Change of postal address, phone numbers, email address

No./Street

Suburb/Town State/Territory Postcode

Email

Phone (home) Phone (work)

Phone (mobile)

Change of residential address (if different from postal address)

No./Street

Suburb/Town State/Territory Postcode

Change of recorded date of birth Correct date of birth (DD MM YY)

3. YOUR TAX FILE NUMBER (TFN)

My TFN is:

Providing your TFN to us means:

- We'll be able to accept all types of contributions to your account.
- The tax on contributions to your account will not increase.
- Other than the tax that may ordinarily apply, no additional tax will be deducted when you start withdrawing your super.
- It will be easier to trace different super accounts in your name so that you will receive all your super benefits when you retire.
- With your consent we can check with the ATO for any lost super or another super fund for super you may have and arrange for the super to be combined in your Active Super account.

4. AUTHORISATION TO PROVIDE INFORMATION TO YOUR EMPLOYER

I agree to my updated information and certified documentation being supplied to my employer.

Sections 5 and 6 are for pension members only

5. YOUR NEW BANK ACCOUNT DETAILS

Enter details of the bank account into which you would like your Active Super Account-Based Pension payment to be paid. This account must be held in your name.

Please also attach a copy of your bank statement for this account which states your name, BSB and account number.

We only need to see your name, the BSB and account number. You can blank out amounts or transactions you don't want us to see.

Please change my bank account details as soon as possible

OR

effective from (DD MM YY)

Name of financial institution

Account name

Branch (BSB) no. - Account no.

NOTE: The account must be in your name or a joint account of which you are one of the account holders.

ONLY complete this section if you are a member of the Active Super Account-Based Pension Plan.

NOTE: Requests to change your pension payments must be received at least five (5) business days before the due date of your next payment or your request may not be processed in time for that payment.

6. YOUR NEW PENSION PAYMENT DETAILS

Please commence my pension account:

As soon as possible OR Commencement date (DD MM YYYY)

Payment frequency

Twice-monthly Monthly Quarterly Half-yearly
 Yearly With first payment to commence in the month of

Amount required each pension payment

Minimum pension income
 Specific pension income (per year) \$
 Maximum pension income (only relevant to Transition to Retirement Pensions)

If 'Maximum pension income' selected:

Pro-rata of yearly pension over the remainder of the financial year (reduced)
 Full yearly pension to be paid in the remaining months (not reduced)

NOTE: We will continue to withhold this additional amount of tax and send it to the Australian Taxation Office on your behalf until you either ask us in writing to stop this deduction or when you turn 60 years of age.

7. WITHHOLDING TAX (OPTIONAL)

Please withhold additional tax of \$

Per: twice-month month quarter
 half-year year

8. YOUR DECLARATION

By signing this form I am making the following statements:

- I have read the relevant PDS.
- I declare the information provided is true and correct.
- I have read the Privacy Collection Statement and understand how Active Super will use the personal information provided on this form.

Name

Signed

Date (DD MM YY)

SEND YOUR COMPLETED FORM BACK TO US AT:

Mail Active Super, PO Box N835, Grosvenor Place NSW 1220

Please mail original documents as they are required for proof of identity.
Please do not email.

Privacy Collection Statement

The information provided on this form is collected by LGSS Pty Limited (ABN 68 078 003 497) as Trustee for Local Government Super (ABN 28 901 371 321) ('Active Super') for the purposes of administering accounts and providing services to you associated with fund membership. If you do not provide the requested information, Active Super may not be able to perform these services. Your personal information may be shared with our administrator, other superannuation trustees and other services providers, in order to be able to provide our services to you. We may provide information to government, regulatory or other bodies if required by law. For further information about how we manage and protect personal information, please refer to our privacy policy available at activesuper.com.au/privacy-policy or by calling us on 1300 547 873. It sets out how we use the information we hold about you, how you can access and correct the information, how you may complain about a breach of privacy and our process for resolving privacy related enquiries and complaints.

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