

TransPension

Request to vary your TransPension Payment

ABOUT THIS FORM

Use this form to change your pension payment amount and bank account.

Note: If you are changing your bank details you will need to post the form and a certified copy of your ID to us. You will also need to provide proof of your bank account details, e.g. copy of a bank statement.

IF YOU NEED HELP

For assistance completing this form you can call us from **8am to 8pm (AEST/AEDT) weekdays on 1800 222 071**. We're here to help.

Please complete all sections of this form as applicable, sign at Step 6, and return the completed form to **TWUSUPER, GPO Box 779, MELBOURNE VIC 3001**.

1. YOUR PERSONAL DETAILS

Member number

Account number

Mr / Mrs / Ms / Miss / Other

Given name

Surname

Date of birth
 /
 /

Residential address (must be advised)

Suburb

State

Postcode

Postal address (if different to the above)

Suburb

State

Postcode

Daytime telephone

Mobile

E-mail

See the 'Sign the form' section of this form for details of how we use your email address and mobile phone number

2. DECIDE ON YOUR PAYMENT FREQUENCY AND AMOUNT

Payment Frequency

I wish to receive my pension payment (select one option):

Fortnightly Monthly Quarterly Half yearly Yearly

When would you like your pension payments to start? For any questions, please refer to your Product Disclosure Statement (PDS)

Start my payments on the next standard payment date after my application is processed.

OR

Start my payments on the next standard payment date after / /

Note: Pension payments are made on the 28th of the month (or on every second Tuesday for fortnightly payments).

To ensure you meet the payment date on the month you specify, you should endeavor to provide us with your completed (and correct) form at least 10 days before the payment date. If you do not advise a starting month your payments will commence on the next available payment date.

If your nominated amount is less than the minimum or greater than the maximum, your payment amount will be adjusted to be either the minimum or maximum.

Important: If you do not nominate a payment frequency your application will be deemed incomplete and will not be able to be processed by the Fund.

Payment Amount

I wish to receive my pension payment in the following amount (select one option ✓):

- Minimum amount
- Nominated amount of \$ per the payment frequency I have selected above
- Maximum amount of 10% (only applicable to Pre-retirement Super Pension accounts)

Note: If your nominated amount is less than the minimum or greater than the maximum, your payment amount will be adjusted to be either the minimum or maximum.

If you do not tick an option above, your pension payments will be made at the minimum amount permitted.

3. CHANGE YOUR BANK ACCOUNT

Bank account details

- Keep using my existing bank account
- Pay my pension payment into the following bank account

Name of institution

BSB

Account number

Account name

Note: The account nominated above must be in your name and must be an account for which you can sign to withdraw, either solely, or with another person. **Please provide proof of your bank account details, e.g. copy of a bank statement.**

4. ATTACH PROOF OF IDENTITY

For identification purposes, you **MUST** attach a certified copy of either your Driver's Licence or Passport (or acceptable alternatives). See the 'Completing proof of identity' section for details of certification and acceptable alternative documents. Failure to provide appropriate proof of identification may result in delays in the processing of your payment(s).

I have attached proof of my identification

5. DO YOU REQUIRE A CENTRELINK SCHEDULE?

If you receive income support payments from Centrelink or the Department of Veterans' Affairs, you may wish to provide them with an updated Centrelink Schedule specifying your new pension details.

Yes, I require a Centrelink Schedule

Note: We will post a Centrelink Schedule to you within 4 days of receiving your request.

WE RESPECT YOUR PRIVACY

Our Privacy Statement explains how we collect, use and protect your personal information. Call us on **1800 222 071** or visit **twusuper.com.au** for a copy.

6. SIGN THE FORM

By signing this form I:

- acknowledge that I have read and understood this form
- acknowledge that I have received all information I require in order to exercise the choices I have made
- acknowledge that I have read and understood the Combined Financial Services Guide and the Product Disclosure Statement for TransPension and agree to be bound by it
- accept that I will be bound by the provisions of the trust deed and rules which govern the operation of TWUSUPER
- understand that the information provided within this form will be used by the Trustee to vary my pension payments and/or bank account
- understand and consent to my information being collected, disclosed and used in the manner set out in this form
- understand that, under Australian Taxation Office regulations, I must keep a copy of this form for five years from the date completed
- declare that the information provided in this form is true and correct

Signature

Date

Sign
here

X

D D / M M / Y Y Y Y

Print, sign and return this form to the fund along with your certified documents to:

TWUSUPER
GPO Box 779
Melbourne VIC 3001

Once you have provided all required documentation, your request will be processed within 3 business days.

Proof of identity

Protecting your super

Why we need proof of your identity

By law, we have to confirm your identity when you:

- > want to withdraw money from your super account
- > change your name (see below)
- > make a claim as the beneficiary of a member who is deceased.

This protects you and your money against fraud or theft.

This fact sheet outlines the most commonly provided proof of identity documents and the most commonly used people who are authorised to certify those documents. For a complete list, go to [twusuper.com.au/certify](https://www.twusuper.com.au/certify) or call us on **1800 222 071** 8am to 8pm (AEST/AEDT) weekdays.

Changing your name

If you are changing your name, you'll need to provide original certified copies of documents that show a connection between your new name and your previous name. These documents include:

- > a name change document issued by the Registry of Births, Deaths and Marriages
- > a marriage certificate
- > a divorce order
- > your birth certificate.

How to get your proof of identity documents certified

The person who is authorised to certify your documents (see over) must see the original and the copy to ensure both documents are identical, then certify all pages are true copies by writing or stamping 'Certified true copy' followed by:

- > their signature
- > printed name
- > qualification (eg Justice of the Peace, Australia Post employee)
- > registration number (if applicable), and
- > date.

People of Aboriginal and Torres Strait Islander heritage

Flexible approach to reliable and independent documentation for persons of Aboriginal and/or Torres Strait Islander heritage

There may be circumstances where persons of Aboriginal and/or Torres Strait Islander heritage may be unable to produce conventional identification documents or produce ones with conflicting information.

In certain circumstances, TWUSUPER may allow for the adoption of a flexible approach to identification and verification of persons of Aboriginal and/or Torres Strait Islander heritage; especially those in remote communities

Proof of identity documents

You have two options when deciding which proof of identity documents to use:

Option 1

A certified copy of one of the following:

- > current photographic driver's licence
- > current photographic proof of age card
- > current passport or a passport that expired within the last two years (with English translation where appropriate)
- > current photographic national identity card (with English translation where appropriate).

Option 2

A certified copy of one of the following:

- > birth certificate or birth extract (with English translation where appropriate)
- > citizenship certificate issued by the Commonwealth or foreign government (with English translation where appropriate)
- > current pension card issued by Centrelink that entitles you to financial benefits.

Plus

A certified copy of one of the following (showing your name and current residential address):

- > notice issued by the Commonwealth, State or Territory Government within the last 12 months which records the provision of financial benefits (eg a Government assistance payment)
- > notice issued by the Australian Tax Office within the last 12 months which records a debt payable or refund due (eg a Notice of Assessment)
- > notice issued by a local council or utility provider within the last three months (eg a rates notice from your local council).

by way of a document such as an indigenous community identity card, or a formal reference/statement as to the member's identity accepted from one of the categories of persons listed below, correspondence from a government authority that shows the customer's name or (with the approval of the AML/CTF Compliance Officer) a photograph of the person incorporated into a statement as to the identity of the customer, using the letterhead stationery of the organisation.

Referees for Identification and Verification of identity of Aboriginal and Torres Strait Islander people

The Trustee may accept referee statements from the following (or any other person with the approval of the AML/CTF Compliance Officer):

- › Chairperson, Secretary or CEO of an Aboriginal/Torres Strait Islander organisation, or a board member of a local Aboriginal Land Council

- › School principal or School counsellor
- › A Minister of Religion
- › Health Professional or Manager in Aboriginal/Torres Strait Island Medical Services
- › Police officer
- › Another person before whom a statutory declaration can be made
- › Community leader or recognised Elder (who is not a parent, sibling, or child of the subject)
- › The customer's current employer or manager.

Please note: TWUSUPER may require referees to themselves provide a government document attesting to their identity.

Who can certify your proof of identity documents?

The people listed below can certify copies of your proof of identity documents:

- › a person who is enrolled on the roll of the Supreme Court of a state or territory, or the High Court of Australia, as a legal practitioner (however described)
- › an officer with, or authorised representative of, a holder of an Australian Financial Services Licence, having two or more continuous years of service with one or more licensees
- › a person licensed under a current state or territory law to practise in any of the following occupations:
 - Chiropractor
 - Dentist
 - Legal practitioner
 - Medical practitioner
 - Nurse
 - Optometrist
 - Patent attorney
 - Pharmacist
 - Physiotherapist
 - Psychologist
 - Trade-marks attorney
 - Veterinary surgeon
- › also a person falling within any of the following categories:
 - Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
 - Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the *Consular Fees Act 1955*)
 - Bailiff
 - Bank officer with two or more continuous years of service
 - Building society officer with two or more years of continuous service
 - Chief Executive Officer of a Commonwealth court
 - Clerk of a court
 - Commissioner for Affidavits
 - Commissioner for Declarations
 - Credit Union officer with two or more years of continuous service
 - Employee of the Australian Trade Commission who is:
 - in a country or place outside Australia; and
 - authorised under paragraph 3 (d) of the *Consular Fees Act 1955*; and
 - exercising his or her function in that place
 - Employee of the Commonwealth who is:
 - in a country or place outside Australia; and
 - authorised under paragraph 3 (c) of the *Consular Fees Act 1955*; and
 - exercising his or her function in that place
 - Fellow of the National Tax Accountants' Association
 - Finance company officer with 2 or more years of continuous service
 - Holder of a statutory office not specified in another item
 - Judge of a court
 - Justice of the Peace
 - Magistrate
 - Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the *Marriage Act 1961*
 - Master of a court
 - Member of Chartered Secretaries Australia
 - Member of Engineers Australia, other than at the grade of student
 - Member of the Association of Taxation and Management Accountants
 - Member of the Australian Defence Force who is:
 - an officer; or
 - a non-commissioned officer within the meaning of the *Defence Force Discipline Act 1982* with two or more years of continuous service; or
 - a warrant officer within the meaning of that Act
 - Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants
 - Member of:
 - the Parliament of the Commonwealth; or
 - the Parliament of a state; or
 - a territory legislature; or
 - a local government authority of a state or territory
 - Minister of religion registered under Subdivision A of Division 1 of Part IV of the *Marriage Act 1961*
 - Notary Public
 - Permanent employee of the Australian Postal Corporation with two or more years of continuous service who is employed in an office supplying postal services to the public
 - Permanent employee of:
 - the Commonwealth or a Commonwealth authority; or
 - a state or territory or a state or territory authority; or
 - a local government authority; with two or more years of continuous service who is not specified in another item in this Part
 - Person before whom a statutory declaration may be made under the law of the state or territory in which the declaration is made
 - Police officer
 - Registrar, or Deputy Registrar, of a court
 - Senior Executive Service employee of:
 - the Commonwealth or a Commonwealth authority; or
 - a state or territory or a state or territory authority
 - Sheriff
 - Sheriff's officer
 - Teacher employed on a full-time basis at a school or tertiary education institution
 - Member of the Australasian Institute of Mining and Metallurgy
 - An officer with, or a credit representative of, a holder of an Australian credit licence, having two or more years of continuous service with one or more licensees
 - A person who, in the country of where the identity documents are certified, is or is the equivalent of a:
 - Justice of the Peace
 - Notary Public
 - Court Official
 - Legal practitioner holding a current practicing certificate
 - Person authorised by local law to witness court documentation, official documents or identity documents.

We're here to help

If you have any queries or need help to complete the paperwork please call us on **1800 222 071** between Mon-Fri 8am – 8pm (AEST/AEDT).



For the people who
keep Australia moving