

Payment information and nomination

Defined benefit (pre-1988) account



Please use a dark pen and CAPITAL letters. Insert (X) when you have to choose an option.

If you have any questions, please call us on 1300 650 873.

1. Your personal details

Member number	Account number	Date of birth
<input type="text"/>	F S S U <input type="text"/>	<input type="text"/>
Title	Last name	
<input type="text"/>	<input type="text"/>	
Given name(s)		
<input type="text"/>		
Address		
<input type="text"/>		
Suburb	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Daytime contact number	Mobile number	M F
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email (for security reasons, please ensure that your nominated email address is your personal email address and not a role-based email address such as employee_title@company.com.au)		
<input type="text"/>		



Last pay period end date

This is the final contribution payroll period for the defined benefit member. This is not the date that the contribution will be paid to the Fund.

2. Cease date (this section is to be filled in by your HR or Payroll Officer)

This section is required to be completed by your employer if you:

- have recently ceased employment
- are forfeiting the scheme
- are aged 65 and over but still working

Last pay period end date (DD-MM-YYYY)

Name of organisation

Employer code

HR/payroll officer's name

HR/payroll officer's signature

Date (DD-MM-YYYY)



i Certifying your identity

Before we can process your request, the trustee must be absolutely certain of your identity which is why we require certified copies of documents confirming your identity. Please refer to *Proof of identity* fact sheet for details of acceptable forms of documentation. Please note if an incorrect document/information is provided, it may delay processing your request.

3. Select your option

Note: Depending on your employment status, the benefit options may vary.
Please select (X) one of the four status and benefit options.

Resignation benefit

- I am under 55 and have ceased employment with my defined benefit employer

Date ceased employment

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- Option 1: Lump sum and deferred benefit**
- Option 2: Deferred lump sum and deferred fortnightly lifetime pension**
- Option 3: Deferred benefit only**

If you select Option 1, the deferred lump sum will be transferred to a deferred account. If you select Option 2 or Option 3, both options will be maintained for you in a deferred account. Accessing any deferred components are subject to fund and preservation rules. You do not need to complete the Payment distribution instructions in Section 4 & 5. Go directly to Section 6.

Retrenchment benefit

- I am under 55 and been made redundant (genuine redundancy) from my Defined Benefit employer

Date ceased employment

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- Option 1: Lump sum only**
- Option 2: Lump sum and deferred fortnightly lifetime pension**

If you select Option 2, the deferred fortnightly pension will be transferred to a deferred account.

Retirement benefit

- I am over 55 and have ceased employment with defined benefit employer but not retired from the workforce

Date ceased employment

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- I have reached my preservation age and permanently retired from the workforce

Retirement date

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- I am aged 65 years or over
- Option 1: Lump sum only**
- Option 2: Lump sum and fortnightly lifetime pension**

Date of birth	Preservation age
Before 1 July 1960	55
1 July 1960 to 30 June 1961	56
1 July 1961 to 30 June 1962	57
1 July 1962 to 30 June 1963	58
1 July 1963 to 30 June 1964	59
1 July 1964 or after	60

i Deferred component

Any deferred component will be transferred to a deferred account and are subject to preservation and fund rules. If you would like to access/transfer your deferred component, please also complete a deferred form.

Forfeiture benefit

- I'm still working for a defined benefit' employer, but wish to close my account

If you close (forfeit) the scheme, both options (lump sum or lump sum and fortnightly pension will be transferred to a deferred account.

4. Payment instructions (for lump sum benefit)

- Transfer my lump sum to my Aware Super accumulation account**

** Amounts transferred to your accumulation account with the fund will receive investment returns (positive or negative) in accordance with the investment option(s) applicable to your accumulation account, effective from the date of transfer.

- Transfer my lump sum to an external superannuation fund or self-managed super fund (SMSF)

Fund or SMSF name

Fund or SMSF address

Suburb

State

Postcode

Australian Business Number (ABN)

Please provide at least one of the following:

Unique Superannuation Identifier (USI)

Membership number for your nominated fund

i Bank details

The bank account must be in your name and a copy of your statement or passbook showing your full name, address and account details must be provided if this option is selected. If you do not provide a bank statement, then payment will be made by cheque to your current postal address.

- Transfer my available* entitlement to my bank account or to my SMSF account

* Accessing lump sum benefits are subject to preservation status and satisfying a condition of release. If this option is selected and you are ineligible to access part/whole of the funds, the remaining funds (preserved) will be transferred to your accumulation account.

Account name

BSB number

Account number

Name of financial institution

Branch

i Lifetime pension

We use your employer's last payroll period date to close your defined benefit account. Therefore, your pension will be effective from the next day. Note this is not your termination date.

5. Lifetime pension (if applicable)

Please note that you also need to complete a Tax file number declaration form if you are under 60 years of age.

- Make my lifetime pension payments to the bank account shown in section 4

OR

- Make my lifetime pension payments to the bank account shown below:

Account name

BSB number

Account number

Name of financial institution

Branch

6. Privacy

The personal information you provide on this form is collected by and held for Aware Super by the fund administrator, Mercer Administration, in accordance with the *Australian Privacy Principles of the Privacy Act 1988 (Cth)*, for the purpose of administering your account and providing you with services associated with your fund membership. For further information about how your personal information is handled, please call us on **1300 650 873** or visit aware.com.au/privacy to view the policy (a hard copy of the policy may also be provided on request). The policy contains information about how you may access and seek correction of your personal information, how you may complain about a breach of your privacy and other important information about how your personal information is collected, used and disclosed.

7. Declaration

- I have no intention of continuing my defined benefit membership.
- I have read and understand the options available to me as outlined above and explained in the explanatory notes on our website under fact sheets.
- I understand that any lump sum payments (immediate or deferred) are subject to preservation rules and conditions in the Trust Deed.
- I have read and understand the Aware Super privacy policy.
- I understand that the trustee cannot provide me with advice about which option to select and that if I require such information (taking into account my personal situation) I should see a licensed or authorised financial planner.
- I understand that, if I select payment, the lump sum option benefit will be allocated returns at the defined benefit earning rate or CPI until the date of payment.
- I understand that any lump sum transferred to my accumulation account with the fund account will be subject to investment returns (which may be positive or negative) from the effective date of the transfer.

 Please sign and date form here.

Signature

Date (DD-MM-YYYY)
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 Send the form to this address.

Name (print in CAPITAL letters)

6. Where to send your completed form

Return the completed form to **Aware Super PO Box 1229 WOLLONGONG NSW 2500**. If you have any questions, please call us on **1300 650 873**.