

Payment information and nomination

Defined benefit deferred 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"/>	<input type="text"/> F <input type="text"/> S <input type="text"/> S <input type="text"/> 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"/>		

2. Reason for cessation

Select (X) one option only

- I declare that I am aged between my preservation age, and under age 60, and have permanently retired from the workforce

Retirement date

- I declare that I am over age 60 and have ceased employment since turning 60

Date ceased employment

- I am aged 65 years or over

- I have not met any of the above however would like to transfer my benefit (subject to fund rules)

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

3. Benefit options

IMPORTANT: Depending on your deferred membership category, your options may vary. Please refer to your recent statement to identify your membership category type and benefit options or call us on 1300 650 873.

Please select (X) one of the four status and benefit options.

Vested	Left Before 1988	Left After 1988	Pension Only
<input type="checkbox"/> Lump sum	<input type="checkbox"/> Lump sum ² OR <input type="checkbox"/> Lump sum ² & pension	<input type="checkbox"/> Lump sum <input type="checkbox"/> Lump sum ² & pension	<input type="checkbox"/> Pension
	<small>Note: You will only have one option available.</small>		



² Please note that you cannot to transfer/access the lump sum² benefit if you are under 55 unless you have satisfied a condition of release.

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.

4. Payment instructions (for lump sum benefit)

If you are under 55 – transfer my discounted* lump sum (not applicable for lump sum²) to my:

- Aware Super accumulation account** or;
- To an external superannuation fund or self-managed super fund (SMSF)

* A discount rate of 4% compounded annually will be subtracted from the lump sum amount for every year you are under 55.

If you are over 55 – transfer my lump sum to my:

- Aware Super accumulation account** or;
- To an external superannuation fund or self-managed super fund (SMSF)

Fund or SMSF name

[Grid for Fund or SMSF name]

Fund or SMSF address

[Grid for Fund or SMSF address]

Suburb

[Grid for Suburb]

State

[Grid for State]

Postcode

[Grid for Postcode]

Australian Business Number (ABN)

[Grid for Australian Business Number (ABN)]

Please provide at least one of the following:

Unique Superannuation Identifier (USI)

[Grid for Unique Superannuation Identifier (USI)]

Membership number for your nominated fund

[Grid for Membership number for your nominated fund]

** 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.

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

All deferred benefits are preserved therefore accessing lump sum benefits are subject to meeting preservation age and/or satisfying a condition of release.

Account name

[Grid for Account name]

BSB number

[Grid for BSB number]

Account number

[Grid for Account number]

Name of financial institution

[Grid for Name of financial institution]

Branch

[Grid for Branch]

i Lifetime pension

You need to satisfy a condition of release before you can commence your lifetime pension. We use either the date you met the condition of release or date we received all relevant documents required (whichever is later). Therefore, your pension will be effective from the next day.

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

[Grid for account name]

BSB number

[Grid for BSB number]

Account number

[Grid for account number]

Name of financial institution

[Grid for name of financial institution]

Branch

[Grid for 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 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 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 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

[Signature line]

Date (DD-MM-YYYY)

[Date grid]

Name (print in CAPITAL letters)

[Name grid]

Send the form to this address.

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.

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