

Change your Flexible Income to a Managed Income

1800 005 166
info@caresuper.com.au
GPO Box 1547, Hobart TAS 7001

Use this form to change some or all of your Flexible Income account to a Managed Income account.

Before you complete this form you should:

- read our *Retirement Income PDS* available at caresuper.com.au/pds
- consider whether a Managed Income account is appropriate to your personal circumstances
- seek personal advice to confirm if this change will have tax or social security implications

Important information

With a Managed Income account, your fortnightly income payment amount and investments are set for you, aiming to provide you with stable, regular payments until age 90 (but this isn't a guarantee), which are generally indexed to keep pace with inflation. We'll confirm these details once your Managed Income account has been set up.

Your new income payments will continue to be paid to the same bank account that was used for your previous income payments.

Your current beneficiary nomination in your Flexible Income account will be applied to your new Managed Income account. If you'd like to change your nomination, our forms are available at caresuper.com.au/forms, or call us for more information.

We may need to make an additional income payment before we change your account to ensure you meet minimum requirements.

Section 1

Your details

Member number

Account number

Date of birth (DD MM YYYY)

Last name

Given name(s)

Residential address

Suburb/Town/City

State

Postcode

Preferred phone

Email



Section 2

You need at least \$20,000 to open a Managed Income account.

Change to a Managed Income account

Change the following amount from a Flexible Income account to a Managed Income account:

my full account balance. Your account number will stay the same, however your income payments and investments will change.

OR

an amount of \$

- To keep your Flexible Income account open, you need to leave a balance of at least \$6,000, or your minimum annual payment amount less payments already received this financial year, whichever is greater. We may adjust the amount specified above to meet these requirements.
- Your Flexible Income account number will stay the same, but you'll receive a new account number for your new Managed Income account.
- You'll receive two sets of income payments - you'll continue to receive your Flexible Income payments at the current frequency and you'll also receive fortnightly payments from your Managed Income account.
- The amount transferred into your new Managed Income account will be paid in line with the future transaction strategy you've chosen in your Flexible Income account.

Section 3

I apply to open a Managed Income account with CareSuper and I acknowledge that:

Member declaration

- I've fully read and understood this form, and the information I've provided is true and correct
- my first payment will be made in the next available payment run
- I'll be bound by the policies, procedures, trust deed and rules that govern CareSuper and relevant laws
- I consent to the use of my personal information as outlined in CareSuper's *Privacy policy* available at caresuper.com.au/privacy-policy or by calling us on **1800 005 166**
- I've received, read and understood the latest *Retirement Income PDS* and agree to be bound by it
- the trustee has advised me to obtain personal financial advice and I've received all the information I need to understand the choices I've made

Your signature

Date (DD MM YYYY)



Return the completed, signed and dated form via:

- upload using the Contact Us portal in **Member Online**
- email to info@caresuper.com.au
- mail to CareSuper, GPO Box 1547, Hobart TAS 7001