

Convert your Transition to Retirement Income account

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Use this form to convert your Transition to Retirement (TTR) Income account to a Flexible or Managed Income account.

Important information

- Before you complete this form, you should read our *Retirement Income PDS* available at caresuper.com.au/pds and consider whether a Flexible or Managed Income account is appropriate for your personal circumstances.
- You should seek personal advice to confirm if this request will have tax or social security implications.
- The transfer balance cap is a limit on how much super can be transferred into retirement income products like the Flexible and Managed Income account. Tax penalties may apply if you exceed the cap.
- Your income payments will continue to be paid to the same bank account that your TTR Income is paid.
- We may need to make an additional income payment before we change your pension to ensure you meet minimum requirements.
- Your current beneficiary nomination in your TTR Income will be applied to your new Flexible or 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.
- If you want to add money to your Retirement Income account, contact us before completing this form.

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

Are you eligible to convert?

Place an X in the box below that applies to you. Select one only.

☐ I'm aged 60-64 and have ended an employment arrangement since turning 60.

Date your employment arrangement ended (DD MM YYYY)

☐ I'm aged 60-64 and have permanently retired. I don't intend to work again for 10 or more hours a week.

Date of retirement (DD MM YYYY)

If you can't tick one of the boxes above, you may not be eligible to convert your TTR Income.

Section 3

Do you want a Flexible or Managed Income account?

Tell us if you want a Flexible or Managed Income account. Select one only.

☐ I want a Flexible Income account

Your current income payments and investments in your TTR Income will continue in your Flexible Income account. You can update these at any time.

OR

☐ I want a Managed Income account

Converting to a Managed Income will change your income payments and investments.

With a Managed Income account, your fortnightly income payments and investments are set for you, aiming to provide you with stable, regular payments until age 90 (but this isn't guaranteed), which are generally indexed to keep pace with inflation.

We'll confirm the details of your investments and how much you'll receive as your fortnightly income payment once your Managed Income account has been set up.

Section 4

Member declaration

I authorise CareSuper to convert my TTR Income. By signing this form I acknowledge that:

- I've fully read and understood this form, and the information I've provided is true and correct
- I've read and understood the latest *Retirement Income PDS* available at caresuper.com.au/pds and agree to be bound by it
- I've received, read and understood information about the investment options available to me, including investment objectives and risks associated with each strategy. I understand the range of directions I can give, the circumstances in which they can be changed, and a default option will apply if I don't make an investment choice
- I'll be bound by the policies, procedures, trust deed and rules that govern CareSuper and relevant laws
- 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
- I understand CareSuper may make enquiries to verify the answers I've given, including confirming information I've provided with my employer
- my first payment will be made in the next available payment run
- 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**

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