

# Pension election form



Use this form to change the amount or frequency of your pension payments, update your bank account details or change how your pension is drawn down.

If you're changing your investments, you'll need to log in to MemberOnline from [caresuper.com.au/login](https://caresuper.com.au/login) or call us on **1300 360 149**. You can also change your pension payments in MemberOnline.

Complete this form in blue or black pen using BLOCK LETTERS and tick  where applicable.

## 1. PERSONAL DETAILS

Member account number

Date of birth (DD/MM/YYYY)

Title

Surname

Given names

Residential address (required)

Suburb

State/territory

Postcode

Postal address (if different from above)

Suburb

State/territory

Postcode

Mobile

Daytime telephone

Email

Gender  Male  Female

## 2. CHANGING YOUR BANK ACCOUNT DETAILS

Please provide details of the bank account your pension payments will be paid into.

**If your bank account isn't changing, you don't need to complete this section.**

Bank name/financial institution

Account holder's name

BSB

Account number



**NOTE:** Please provide a copy of your bank statement so we can verify that the details you have provided are correct. The name and address on the statement must match the information we have on record for your account.

### 3. CHANGING YOUR PENSION PAYMENT

Your elected pension payment amount must fall at or between the minimum and maximum (if applicable) amounts. Call **1300 360 149** to understand your minimum and maximum amounts.

Changing your pension amount could alter the tax on your pension payments if you're under age 60.

**Members must report any changes in their circumstances to Centrelink within 14 days of a change.** If you request a commutation or change the frequency or amount of your payments, you'll need to inform Centrelink within 14 days.

I wish to change my payment to an amount of:

\$ \_\_\_\_\_, \_\_\_\_\_ per periodic payment

I want to be paid: (✓) tick a periodic payment frequency

- Twice-monthly**
- Monthly**
- Quarterly** (September, December, March & June)
- Half-yearly** (December & June)
- Yearly\***

\*Yearly pension payments are made every June. If you wish to receive your yearly pension payment in a different month, please specify which month:

\_\_\_\_\_

Month

Note: Your change will usually apply from the payment date after we receive this form.

**Remember to sign this form below.**

### 4. CHANGING HOW YOUR PENSION IS DRAWN DOWN

Want to change your investments? Log into your MemberOnline account from [caresuper.com.au/login](https://caresuper.com.au/login) and switch your investments online.

Complete this section to change how your pension payments are drawn down.

- I want to draw down my pension payments proportionately across my existing investment options.** Your pension payments will be deducted across your investments in the same proportions as your balance. (You don't need to complete the table on the next page.)
- I want to draw down my pension payments sequentially.** You'll need to number in order of priority how you want your pension payments deducted from all your investment options\*. Make sure all investment options that you hold are numbered. Complete column A in the table on the next page. Make sure all your investment options are numbered.
- I want to draw down my pension payments according to the nominated investment choice below.** Choose the draw-down percentage of your selected investment options. Complete column B in the table on the next page.

Remember you can change the amount or frequency of your pension payments, online at [caresuper.com.au/login](https://caresuper.com.au/login).

\*Your payments will be drawn down from your investment options in the order you label them i.e. option 1 until depleted, then option 2 until depleted and so on.

Draw down my payments and any lump sum withdrawals as marked below:

Draw down				
	A. Sequentially: Number your investment options in the order you want them drawn down.	OR	B. Percentage: Choose the percent of investment you want to draw from.	
Managed options		Example only		Example only
Capital Guaranteed	_____		_____ %	%
Capital Stable	_____		_____ %	%
Conservative Balanced	_____	1	_____ %	60%
Balanced	_____		_____ %	%
Sustainable Balanced	_____		_____ %	%
Alternative Growth	_____		_____ %	%
Growth	_____		_____ %	%
Asset class options				
Cash	_____		_____ %	%
Fixed Interest	_____	2	_____ %	20%
Direct Property	_____	3	_____ %	20%
Australian Shares	_____		_____ %	%
Overseas Shares	_____		_____ %	%
<b>Total</b>			<b>100%</b>	<b>100%</b>

## 5. MEMBER SIGNATURE

You must sign and date this form.



Member's signature \_\_\_\_\_

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Date (DD/MM/YYYY)


\_\_\_\_\_  
Full name

Centrelink customers:

- We report your balance and payment information to Centrelink twice-yearly on your behalf (August and February). If Centrelink asks you to submit this information yourself, please tick (✓) to receive an updated Centrelink Income Stream Schedule. **Members must report any changes in their circumstances to Centrelink within 14 days of a change.** If you request a commutation or change the frequency or amount of your payments, you'll need to inform Centrelink within 14 days.



Please refer to the **Pension Guide PDS** for more information on our investment options. If you'd like a hand completing this form, call us on **1300 360 149**.

 Please note that the percentage column must total 100%. Examples illustrate how to complete this section. What you choose is up to you.



## YOU MUST SIGN AND DATE THIS FORM

Return this completed form to:

**CareSuper**  
**Locked Bag 20019**  
**Melbourne VIC 3001**

For more information call **1300 360 149**.