

# 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. You can also update these details via MemberOnline.

If you'd like to change your investments for your existing balance you'll need to log in to MemberOnline at [caresuper.com.au/login](https://caresuper.com.au/login) or call us on **1300 360 149**.

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

## 2. CHANGING YOUR BANK ACCOUNT DETAILS

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

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

Bank name/financial institution

Account holder's name

BSB

Account number



**NOTE:** 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 60 years old.

**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:

- The minimum amount allowed
- The maximum amount allowed
- I wish to change my payment to an amount of:

\$ \_\_\_\_\_, \_\_\_\_\_ or \_\_\_\_\_ % 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

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

Want to change your investments? Log into your MemberOnline account at **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 in proportion to my investment options.** Your pension payments will be drawn down in line with your investments, meaning your payments will be drawn down in proportion to your investment options. (You don't need to complete the table on the next page.)
- I want to draw down my pension payments in my preferred order.** You'll need to number in order of priority how you want your pension payments drawn down 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 via MemberOnline at **caresuper.com.au/login**.

\*Your payments will be drawn down from your investment options in the order you label them. We'll start with your first priority investment option and when the balance reaches zero, we'll move on to your second priority investment option.

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>



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

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

## 5. SIGNATURE



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 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.



### YOU MUST PRINT AND THEN SIGN THIS FORM

The form won't be valid if you don't sign and date it.

### ONCE YOU'RE DONE

Upload this completed form to the 'Contact us' section of your MemberOnline account or at [caresuper.com.au/getintouch](https://caresuper.com.au/getintouch)

OR

Return this completed form to:

**CareSuper**  
Locked Bag 20019  
Melbourne VIC 3001

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