

Change of membership details form

For Super and Pension members previously with Christian Super

After identifying yourself in section 1, only complete the sections you wish to change. **This form will be invalid if not signed and dated.**

Use this form if you were previously a Christian Super member.

Send the form together with any other associated documentation to:
Australian Ethical Super Locked Bag 5073
Parramatta NSW 2124 or
email to members@australianethical.com.au

Step 1: Current membership details

Member number (this can be found on your Member Statement)

Date of birth

Mr/Mrs/Ms/Rev/Other

Surname

Given Names

Step 2: Occupational Group

Select the Group that accurately reflects your occupation (your benefit may be affected if your Group is incorrect when you make a claim):

- Group 1, Professional/White Collar (e.g. lawyer, doctor, solicitor, accountant, principal, school business manager)
- Group 2, White Collar (e.g. teacher, clergy, social worker, office worker, travel consultant, home duties)
- Group 3, Blue Collar (e.g. nurse, shop assistant, bus driver, jeweller, fully qualified tradesperson, computer technician, gardener, mechanic, store person, police officer, pilot)

Step 3: Search and consolidate my lost super

- I authorise Australian Ethical Super to use my tax file number to search the Australian Taxation Office (ATO) for any other superannuation accounts in my name and to automatically transfer any ATO held lost super I am entitled to, directly to my Australian Ethical Super account.

Step 4: Changes to my contact details

Phone [daytime]

Mobile

Street number/PO Box

Street name

Suburb/Town

State

Postcode

Email

Step 5: Switch from a Transition to Retirement account to an Account Based Pension account

For Pension members only

To switch your account from a Transition to Retirement to an Account Based Pension, you need to confirm one of the following:

- You have reached your preservation age and are permanently retired
- You have ceased an employment arrangement on or after turning age 60
- You are 65 or over

Step 6: Non-binding beneficiary nomination

If you die Australian Ethical Super will pay your benefit to your dependants as it considers appropriate, or to your legal personal representative. You can nominate your preferred beneficiaries below to assist the Trustee in its decision.

1. Name of dependant

Spouse Child Dependant Legal personal representative

% of benefit

2. Name of dependant

Spouse Child Dependant Legal personal representative

% of benefit

3. Name of dependant

Spouse Child Dependant Legal personal representative

% of benefit

Check total

100%

- !** Percentage must be in whole numbers. Total percentage of benefit nomination must add up to 100%. Please attach a note with additional Dependants if needed.
- !** You can also make a Binding Beneficiary Nomination that requires the Trustee to pay your death benefit to one or more dependants specified by you – the form is available at australianethical.com.au

Step 7: Member declaration

Checklist:

1. Have you notified your employer of your change of details?
2. Have you signed and dated this form?

I Declare that:

- The information I have provided and any associated documentation in support of the changes advised in this form are, to the best of my knowledge, true and accurate.
- I understand Australian Ethical Super will rely on this information in good faith and my record kept by Australian Ethical Super will reflect the information in this form.
- I will immediately notify Australian Ethical Super if any of my personal details change in the future.
- I understand and accept the information contained in this form may be shared with representatives, advisers and service providers of Australian Ethical Super and my employer(s).
- I understand that the Trustee accepts no responsibility for either the incorrect nomination of beneficiaries or the incorrect completion of this form.
- I have received, read, and agree to be bound by the Privacy Collection Notice (Super) and the Privacy Policy available at australianethical.com.au/privacy-policy/

Your signature

X

Date

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 If you have any questions, please contact Australian Ethical Super on 1800 021 227.

Australian Ethical Superannuation Pty Ltd (ABN 43 079 259 733, RSE L0001441, AFSL 526 055),
Trustee of the Australian Ethical Retail Superannuation Fund (ABN 49 633 667 743, USI/SPIN CHR0001AU)