

# Superannuation Change of details



NWCLMASCDF

Please use **BLACK** pen and **BLOCK** letters.

You cannot change your name or change your correspondence and transaction method online and the offline transaction fee will not apply to these changes. All other changes allowed on this form can be performed online. The offline transaction fee will apply if you choose to make these changes offline using this form.

If you do not currently have online access to your Netwealth account you can contact your adviser to arrange the change or arrange online access for future transactions in Step 4 of this form.

**!** You should read the current Product Disclosure Statement for the product in which your account is held as there may have been changes to the terms and conditions governing this transaction. The current Product Disclosure Statement is available on our website.

## Step 1. Provide member details

Client name	<input type="text"/>	<input type="text"/>
Client number	<input type="text"/>	Account number <input type="text"/>

## Step 2. Update personal details (if applicable)

Mr/Mrs/Miss/Ms/Dr/Other	<input type="text"/>	Family name <sup>1</sup>	<input type="text"/>
Given name(s)	<input type="text"/>		
Date of birth	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Sex	<input type="checkbox"/> Male	<input type="checkbox"/> Female

<sup>1</sup> Please attach certified documentary evidence if your name has changed (such as marriage certificate or deed poll).

## Step 3. New contact details (if applicable)

Residential address	<input type="text"/>		
Suburb/town	<input type="text"/>		
State	Postcode	Country (if not Australia)	<input type="text"/>
Postal address (if different from above)	<input type="text"/>		
Suburb/town	<input type="text"/>		
State	Postcode	Country (if not Australia)	<input type="text"/>
Phone	Home ( <input type="text"/> )	<input type="text"/>	Work ( <input type="text"/> ) <input type="text"/>
Mobile	<input type="text"/>		
Email	<input type="text"/>		

## Step 4. Update online access and communication election

### To change your preferred online access and communication method

Level of online access (please select one)	<input type="checkbox"/> Transact	<input type="checkbox"/> Browse only
Communication method (please select one)	<input type="checkbox"/> Electronically <sup>1</sup>	<input type="checkbox"/> Post

AND

Please reissue my login details.

<sup>1</sup> Receiving communications electronically means by an email sent to your email address, an attachment to an email sent to your email address, or notification to you by email that the communication is available for you to access in your secure online account or on the public website. Communications include all letters, statements, confirmations and other notices.

#### Step 4. Update online access and communication election (continued)

You elect to receive your Annual Member Statement and to confirm transactions by accessing your online account, unless you choose the following:

I request that my Annual Statements and monthly Confirmation Statement be sent to me by the communication method selected above.

#### To stop having regular statements sent to you

If you have online access and your Annual Member Statement and monthly Confirmation Statements are currently sent to you, either electronically or by post, you can elect to access the information online and to stop having these statements sent to you:

I elect to access my Annual Member Statement online and to confirm transactions in my online account and I do not want my Annual Member Statement or monthly Confirmation Statements to be sent to me.

#### Step 5. Provide new Income Stream payment details (if applicable)

Amount of pension now required (please tick one box below and nominate amounts as appropriate)

#### Standard Income Stream

Annual amount of pension required<sup>1</sup>

The minimum annual income stream amount

OR  \$         p.a. (must be greater than the minimum amount)

#### Transition to Retirement Income Stream

Annual amount of pension required (please tick one box)

The maximum annual pension<sup>2</sup>

OR  The minimum annual pension<sup>3</sup>

OR  \$         p.a.<sup>3</sup> (must be between the minimum and maximum amount)

#### Term Allocated Pension

Term selected   years

Annual amount of pension required (please tick one box)

Fixed calculated amount

OR  90% of the fixed calculated amount

OR  110% of the fixed calculated amount

OR  Nominated annual amount in allowable 90-110% range \$             p.a.

#### Frequency of payments

Payment frequency (please tick one box)  Monthly  Quarterly  Half yearly  Yearly

Next payment date   /   (payments are made on or about the 15<sup>th</sup> of each month)

<sup>1</sup> If there is less than a full year from the start of your income stream to the next 30 June, you will receive the annual amount reduced on a pro rata basis.

<sup>2</sup> If there is less than a full year from the start of your income stream to the next 30 June, you will receive the full maximum amount over the remainder of the year.

<sup>3</sup> If there is less than a full year from the start of your income stream to the next 30 June, you will receive the annual amount reduced on a pro rata basis.

