



Change member details and options

Members can use this form to change their member details or investment options, to nominate or update their beneficiaries or to provide their tax file number to the trustee. Members with a transition to retirement pension (TRP) can also use this form to request the conversion of their TRP to a retirement pension (eligibility conditions apply).

Section 1: Your request

If you have any questions,
please call us on **1300 112 403** or
email one@smartMonday.com.au

For more information go to our website
smartMonday.com.au

Please select the appropriate option.

Provide or change member details – complete sections 2, 3 and 9.

Convert TRP to a retirement pension – complete sections 2, 4 and 9.

Switch investment options – complete sections 2, 5 and 9.

Provide payment instructions – complete sections 2, 6 and 9.

Nominate or update beneficiaries – complete sections 2, 7 and 9.

Section 2: Your membership details

Member number (if known)

Title Given names

Surname

Date of birth (DD/MM/YYYY)

Phone

Email



Section 3: Your new details

Title Given names¹

Surname¹

Date of birth (DD/MM/YYYY) Sex (M or F)

Phone Email

Postal address

Suburb State Postcode

Section 4: Convert TRP to a retirement pension

Your TRP will convert automatically to a retirement pension when you reach age 65. If you wish to convert your TRP prior to age 65, you must satisfy one of the following 'conditions of release'.

I declare that (tick appropriate condition of release):

- I have retired permanently from the workforce
- I have ceased a paid employment arrangement since turning age 60.
Date ceased employment: (DD/MM/YYYY)
- I am permanently incapacitated²
- I have been diagnosed as being terminally ill²

When your TRP converts to a retirement pension:

- there is no maximum limit on the annual income amount you can choose to receive
- you can withdraw lump sum amounts in addition to your annual income payments
- investment earnings on assets in your retirement pension are tax free.

See the *smartMonday PENSION [Product Disclosure Statement](#)* for more information.

¹ For name changes, you need to attach a certified copy of a relevant official document showing your original name and your new name. See the factsheet *Identification (ID) rules and certification of documents* on our website for Change of name requirements and who can certify document copies. For a date of birth correction, you need to attach a certified copy of your birth certificate, driver's licence or passport.

² Additional requirements apply to a release under these conditions. Please contact us.



Section 5: Your investment switch

Complete the appropriate columns to change the investment options for your current account balance. Your decision is important and it may significantly affect the amount of superannuation you receive.

Important information

Current account balance

- > The investment options you choose must add up to 100% (min. 5% in any option).
- > Investment switches submitted on a valid form will usually take **3 to 5 business days** to be completed and displayed in your account.
- > smartMonday may, from time to time, suspend switching capabilities and unit pricing of investment options. We will endeavour to notify members of significant interruptions via smartMonday.com.au

Pre-mixed options	Current account balance	Sector options	Current account balance
High Growth – Index	%	Australian Shares – Index	%
High Growth – Active	%	Australian Shares – Diversified	%
Growth – Index	%	International Shares – Index	%
Growth – Active	%	International Shares – Diversified	%
Balanced Growth – Index	%	Property – Diversified	%
Balanced Growth – Active	%	Fixed Interest – Diversified – Index	%
Moderate – Index	%	Fixed Interest – Diversified	%
Moderate – Active	%	Cash	%
Defensive – Index	%	Total	100%
Defensive – Active	%		

Section 6: Your pension income payment details

Frequency of pension payments

How frequently would you like to receive your pension payments? Please select the appropriate option.

Monthly	Quarterly	Half yearly	Yearly
	15 March	15 June	
	15 June	15 December	
	15 September		
	15 December		

If you do not make a selection the default is **monthly**. All payments are made on the 15th of each month, commencing in the month this form is received or the following month if received on the 10th or later. Payments by direct credit are expected to reach your account by the 21st of the month at the latest.

According to current Government rules, income payments and withdrawals from a TRP will be drawn in the following order:

- > unrestricted non-preserved
- > restricted non-preserved
- > preserved.

These rules may change in future.

Method of pension payments

Payments will be made electronically via direct credit.

Please give details of your account for the direct credit and attach a copy of a bank statement for your nominated account to confirm your bank details and account information (ie bank name, BSB, account name and number).

I wish to have my pension benefit banked into the following account.

Name of account holder

Name of financial institution

BSB number

Account Number



Section 6:
**Your pension income
payment details (continued)**

Pension payment amount

I would like my annual pension income payment (gross) to be paid as indicated. *Please select the pension you are investing in and mark one option only.*

Retirement pension

The minimum allowed under Government rules*

The following amount that is above the Government minimum

\$

Transition to retirement pension

The minimum allowed under Government rules*

The maximum allowed under Government rules*

The following amount that is above the Government minimum but below the maximum

\$

* Your payment will automatically be adjusted on 1 July each year in order to maintain this instruction.



Section 6:
Your pension income
payment details (continued)

Investment options for pension payments

Please indicate from which option(s) you wish to be paid (complete dollar amounts OR percentage amounts).

If you do not make a selection, your pension payment will be drawn in proportion to your current investment holding within the Pension.

Pre-mixed options	\$ or %	Sector options	\$ or %
High Growth – Index		Australian Shares – Index	
High Growth – Active		Australian Shares – Diversified	
Growth – Index		International Shares – Index	
Growth – Active		International Shares – Diversified	
Balanced Growth – Index		Property – Diversified	
Balanced Growth – Active		Fixed Interest – Diversified – Index	
Moderate – Index		Fixed Interest – Diversified	
Moderate – Active		Cash	
Defensive – Index			
Defensive – Active		Total	



Section 7:
**Your non-binding
death benefit nomination**

In the event of your death while you are a member of the Fund, the benefit provided under the rules of the Fund is usually payable by the trustee to one or more of your dependants or to your estate. Dependants are limited by law to your spouse, your children and any other persons who are financially dependent on you or in an interdependency relationship with you. Your nomination of preferred beneficiaries below will only be used as a guide by the trustee in deciding who should receive your death benefit. (Note: If you wish to make a binding nomination, complete the *Binding death benefit nomination* form on our website.)

If you do not have any dependants please cross this box.

If you do have dependants, we recommend that you list them as your preferred beneficiaries or your legal personal representative/executor for payment of your death benefit below. However you are not required by law to do so. You may change this nomination at any time. Attach a letter if you wish to nominate more than four beneficiaries.

Your percentage nominations must amount to 100% of your benefit.

Beneficiary 1

Name in full

Date of birth (DD/MM/YYYY)	Relationship	Percentage of benefit (%)
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Beneficiary 2

Name in full

Date of birth (DD/MM/YYYY)	Relationship	Percentage of benefit (%)
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Beneficiary 3

Name in full

Date of birth (DD/MM/YYYY)	Relationship	Percentage of benefit (%)
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Beneficiary 4

Name in full

Date of birth (DD/MM/YYYY)	Relationship	Percentage of benefit (%)
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Legal personal representative/executor

Name in full (if it is a corporate body, provide official name)

Percentage of benefit (%)

Postal address

Suburb

State

Postcode

Section 8: Privacy

Aon and the trustee are committed to protecting your personal information in accordance with the Australian Privacy Principles under the Privacy Act 1988 (Cth). We collect, use and disclose personal information to offer, promote, provide, manage and administer the many financial services and products we and our group of companies are involved in as set out in the [Aon Privacy Policy](#) and the [ETSL Privacy Policy](#). In order to do this, we may also share your information with other persons or entities who assist us in providing or promoting our services as set out in these Policies.

Section 9: Your declaration and authorisation

I declare that:

- > I am the person named on this form, or have the power of attorney to act on the member's behalf.
- > The information I have provided on this form is true and correct.
- > I understand investment switches submitted on a valid form will usually take **3 to 5 business days** to be completed and displayed in my account.
- > I understand that smartMonday may, from time to time, suspend switching capabilities and unit pricing of investment options.
- > I have read the current PDS which is designed to help me understand the product and to enable me to make an informed investment choice that is suitable for me.
- > My nomination of preferred beneficiaries is not legally binding on the trustee. I also understand that I can change this nomination at any time.
- > I have read the [Aon Privacy Policy](#) and the [ETSL Privacy Policy](#), and consent to my personal information being handled in accordance with these policies.
- > If I am disclosing personal information about another person, I have obtained their consent to disclose their personal information to Aon or the trustee. I have made them aware that Aon or the trustee may disclose their information to third parties that are reasonably necessary to assist in the provision of the relevant services or products. If I have not obtained the consent of the other person, I will inform Aon or the trustee of this.

Signature

Date (DD/MM/YYYY)