

Changing your personal details



If you would like to change your details with Local Super please complete the relevant section on this form. For more information please refer to your Product Disclosure Statement (PDS) or contact Local Super.

How to complete this form:

1. Complete your Personal details.
2. To update your personal details please complete Section 2.
3. Complete Section 3 if you would like to advise your Tax File Number (TFN).
4. Update your preferred beneficiaries in Section 4.
5. Update your reversionary beneficiary (Term pension only) in Section 5.
6. Complete the Acknowledgement section.
7. Return the completed form to Local Super.

1 Personal details

These are your details that are currently registered with Local Super.

Title Mr / Mrs / Ms / Miss / Other _____ Date of birth ____ / ____ / ____

Given names _____

Surname _____

Residential address (must be provided) _____

Suburb / Town _____ State _____ Postcode _____

Postal address (if different to above) _____

Telephone Home _____ Work _____ Mobile _____

Email _____

Membership number _____

2 Updating your personal details

Where you are requesting a change of name or date of birth, a certified copy* of the appropriate document is required, eg: Marriage or divorce certificate.

* A certified copy is a photocopy of an original document signed as a true copy of the original by a person qualified to execute a statutory declaration.

Title Mr / Mrs / Ms / Miss / Other _____ Date of birth ____ / ____ / ____

Given names _____

Surname _____

Residential address (must be provided) _____

Suburb / Town _____ State _____ Postcode _____

Postal address (if different to above) _____

Telephone Home _____ Work _____ Mobile _____

Email _____



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3

Advising your tax file number

Local Super can request that you provide your tax file number (TFN) under the Superannuation Industry (Supervision) Act 1993, Income Tax Assessment Act 1936, Taxation Laws Amendment (Tax File Numbers) Act 1988 and the Privacy Act 1988. Providing your tax file number is optional however there are a number of things you should know before you decide:

- > If you do provide your TFN, Local Super will use it for legal purposes only. This includes finding or identifying your superannuation benefits, determining the tax payable on any contributions or benefits provided for you, and including the tax file number in information provided to the Commissioner of taxation.
- > If you provide your TFN Local Super may provide it to the trustee of any other super funds to which your super is transferred in the future.
- > Choosing not to provide your TFN is not an offence, but it may mean that you pay more tax on your super payout than would otherwise be the case. If this happens you can claim the extra tax back when you lodge your tax return.

Your tax file number _____

Where you are requesting a change of tax file number a certified copy of the appropriate documentation is required.

4

Updating your preferred beneficiaries

Please refer to your PDS and Fact Sheet FS10 - Nominating Your Beneficiaries for more information.

I wish to nominate the following as my preferred beneficiary(ies) in the event of my death:

Full Name _____

Date of birth _____

Address _____

Relationship _____ Dependant Yes No

Percentage to be paid _____ %

Full Name _____

Date of birth _____

Address _____

Relationship _____ Dependant Yes No

Percentage to be paid _____ %

Full Name _____

Date of birth _____

Address _____

Relationship _____ Dependant Yes No

Percentage to be paid _____ %

Full Name _____

Date of birth _____

Address _____

Relationship _____ Dependant Yes No

Percentage to be paid _____ %

Total allocated **100%**

Local Super will consider your preferred nomination and exercise its discretion to allocate your benefit to the beneficiaries nominated. This nomination is not binding on Local Super. You can change this nomination at any time. If you wish to make a binding nomination please complete the BINDING BENEFICIARY NOMINATION form. Please refer to your PDS and incorporated fact sheets for full details.

5 Updating your Reversionary beneficiary – Term Pension only

I wish to nominate my spouse as a 'reversionary beneficiary' of my Term Pension. This means that if I die, my Term Pension payments continue to be made to my spouse.

Title Mr / Mrs / Ms / Miss / Other _____ Date of birth _____ / _____ / _____

Given names of spouse _____

Surname _____

Postal address _____

Suburb / Town _____ State _____ Postcode _____

Telephone _____

6 Privacy

Personal information on this form will be handled to process your request. It may be disclosed to Local Super's administrator, insurers, your employer (if applicable) and other parties and business support service providers as required, including the trustee of any other fund you may transfer to.

By signing this form you consent to this handling of your personal information. If you do not give this information your request will not be processed.

You may access your personal information by contacting Local Super on: 08 8100 9999 or 1800 882 988 (toll free).

7 Acknowledgement

I acknowledge that the Trustee does not accept any liability for any action I may take or fail to take in relation to my superannuation and recommends that before I make any decision I seek independent financial advice about my personal circumstances.

I understand the changes I have indicated on this form will remain in force until I advise the Trustee otherwise, with the effective date of change being as advised by the Trustee.

In Section 2, if I requested a change of name or date of birth, I have provided the appropriate certified identification.

Signature _____ Date _____

Please send this form with your proof of identification (if required) to:

**Local Super
PO Box 18219
Collins Street East VIC 8003**

If you have any questions please call us on 08 8100 9999 or 1800 882 988 (toll free).

