

Pension top up

Sunsuper Pty Ltd ABN 88 010 720 840 AFSL No. 228975
Trustee of the Sunsuper Superannuation Fund ABN 98 503 137 921

Important: Please provide us with as much information as possible.
Use **BLOCK** letters and dark ink when completing this form and ensure it is signed and dated.



Call 13 11 84
Web sunsuper.com.au
Mail GPO Box 2924 Brisbane Qld 4001

Member details

Member number	<input type="text"/>	Office use only	<input type="text" value="Pension options"/>
Title	<input type="text"/>	First name	<input type="text"/>
Middle name/s	<input type="text"/>	Last name	<input type="text"/>
Date of birth (dd/mm/yyyy)	<input type="text"/>	Gender	<input type="text"/>
Mailing Address	<input type="text"/>		
Suburb / Town	<input type="text"/>	State	<input type="text"/>
		Postcode	<input type="text"/>
Email address	<input type="text"/>		
Home phone number	<input type="text"/>	Daytime phone number	<input type="text"/>

Pension type

I'm adding extra money to a Workforce Pension Retirement Pension

Top up details

It is important to remember your top up amount must be at least \$10,000.

I would like to add a cash contribution to my super before topping up my pension. I have attached a cheque for \$

OR

I would like to rollover an account from a different super fund and have attached a *Rollover your super into Sunsuper* form.

OR

I would like to top up my pension with funds from my existing Sunsuper accumulation account.

Do you intend to claim this contribution or any previous personal contributions made during the relevant financial year as a tax deduction? Yes No

If yes, you will need to submit the appropriate tax deduction form. Just go to the forms page of our website and download the correct form under the *Notice of Intent to claim a tax deduction* section. Make sure you download the form relevant for the year in which you wish to claim your tax deduction. Send this form in with your *Pension top up* form and we will send you an acknowledgement of your intent to claim a tax deduction to use when doing your tax return. It is important you let us know your intention to claim a tax deduction before we top up your pension. Once the top up is completed, income tax laws do not allow us to action future requests for tax deductions of personal contributions made before the top up.

If you are self-employed or substantially self-employed and have made voluntary contributions to Sunsuper during the financial year, you may be eligible to claim a tax deduction.

You are considered 'self-employed or substantially self-employed' if your assessable income or exempt income from paid eligible employment, is less than 10% of your total income for the year.

Income for this purpose includes:

- your assessable income,
- any reportable fringe benefits, and
- any reportable employer superannuation contributions.

Please select how much you would like to top up your pension account with:

Transfer the entire balance of existing Sunsuper accumulation account.

OR

Transfer the following amount from my Sunsuper accumulation account. \$

OR

Transfer my account but leave a balance of \$ existing in my account.

- Note:
- When transferring your entire account balance you should be aware of the effect this may have on any of your existing insurance arrangements.
 - If you expect to receive ongoing contributions, if we have you recorded as actively employed or would like to keep any insurance you're entitled to, a minimum of \$1,500 must be left in your account.
 - When withdrawing part of your account balance, a minimum of \$1,000 will be maintained in your existing account. Changes in daily unit prices may affect this minimum balance.

Please turn over for more information and to sign

Please return your form to Sunsuper, GPO BOX 2924 Brisbane QLD 4001.

We are committed to respecting the privacy of personal information you give us. Our formal Privacy Policy sets out how we do this. If you would like a copy of Sunsuper's Privacy Policy, please let us know. We have also published our Privacy Policy on our website sunsuper.com.au.

FRM-AP005-0711

Pension investment details

I would like to keep my current investment strategy, rebalancing options (if any) and investment payment source.

OR

I would like to change to the Sunsuper *Today and Tomorrow* investment strategy. For more details refer to the *Sunsuper Pension Options Member guide*.

OR

I would like to change my current investment strategy and have enclosed a *Pension investment choice* form available on the Sunsuper website. (Please note the *Today and Tomorrow* investment strategy can only be selected on set up or top up of a pension.)

Beneficiaries

I would like to keep my existing nominated beneficiaries.

OR

I would like to nominate a new reversionary beneficiary:

I understand the reversionary beneficiary is limited to my spouse. I have read the information in the *Sunsuper Pension Options Member guide* before ticking this box.

Title First given names*
Last name*
Date of birth* Gender* M F

OR

I would like to change my existing preferred beneficiaries, or nominate a binding beneficiary and enclose a *Pension change of details* form or a *Binding death benefit nomination* form available on the Sunsuper website.

Declaration

- I understand my tax details and instalment start date will not change, however my minimum or maximum amount and instalment may change with this top up.
- I declare I have fully read this form and the information completed is true and correct.
- I request that my pension be topped up. I understand that this involves:
 - (a) the cessation of my existing pension,
 - (b) the placement of my existing pension balance into my Sunsuper accumulation account, and
 - (c) the withdrawal of the amount from my Sunsuper accumulation account which will be used to start a new Sunsuper pension.
- I understand that once my top up is completed, I cannot claim a tax deduction for personal contributions made before the top up.
- If applicable, I request and consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect to this transfer.
- If applicable, I approve the deduction of a benefit payment fee (if any) from the benefit paid.
- I have considered the fees and charges, effect on insurance cover and the implication to my benefit entitlement prior to rolling over my benefits. I do not require further information and authorise the rollover to proceed.
- I understand I am required to take an amount of pension payments each year at least equal to the **minimum amount** calculated each financial year. I accept and agree to any actions that Sunsuper may take to ensure that I have been paid pension payments at least equal to this minimum amount.

NOTE: if you have not previously supplied certified identification to Sunsuper, you will need to attach a certified copy of your identity before we can process your payment or rollover request. For more information about certified identity and what is acceptable, please refer the Proof of identity requirements factsheet on our website.

Member to sign here

Date
(dd/mm/yyyy)

Checklist

- I have signed and dated this form
- I have attached all, if any, additional forms
- I have attached if required, my certified identification