


Do you need to change your account details?

Did you know you can update some of your account details anytime using our secure online service, *Member Online*?

To see what details you can update online just look on the form for this symbol 

The following describes important things to remember when completing each section of the form:

Section 1 - Your current account details

Complete this section with the details we currently have on your account.

Section 2 - Tax file number (TFN)

If you're not sure if you have already supplied your TFN you can add it now. Before you supply your TFN, please read the TFN section of the form. You don't have to provide your TFN, however if we don't have your TFN you may have to pay more tax than you need to.

Section 3 - Your new contact details

Update this section with any changes you have to your address, phone or email. It's important we have your correct details so we can contact you if we need to. Don't forget you can easily change your contact details using *Member Online*.

Section 4 - Your new personal details

If you've changed your name you'll need to provide a certified linking document which shows the link between your name and your previous name (e.g. *Marriage certificate* or *Change of name certificate* issued by the Births, Deaths and Marriages Registration office). If you're confirming a correct date of birth you'll need to send us an original or certified copy of your identification. Refer to page 2 for more information on acceptable identification documents and who can certify them.

Section 5 - Member Online

Simply complete this section if you would like to view your account online.

Section 6 - Change of beneficiaries

You can update your preferred beneficiaries in this section. If you have a binding death benefit nomination, you can change it by downloading a *Binding death benefit nomination* form from our website [sunsuper.com.au/forms](https://www.sunsuper.com.au/forms).

Section 7, 8 & 9 - Checklist and authorisation

Use the checklist to double check everything is complete. Read the authorisation statements and sign.

What is an acceptable identification document?

If you are updating your date of birth please attach a certified copy of:

- A.** Your current driver's licence or current passport or current national identity card that contains your photo, name and **EITHER** residential address **OR** date of birth (please copy and certify both front and back sections if relevant), **OR**
- B.** Your birth certificate, Australian birth extract, **OR** Citizenship certificate **AND** a current rates, electricity or gas notice (no more than 3 months old) or assessment from the Australian Taxation Office (no more than 12 months old) showing your name and current residential address.

Have you changed your name?

If you've changed your name and haven't previously let us know of your name change, you'll need to provide a certified copy of your *Marriage certificate* or *Change of name certificate* (must be obtained from the Births, Deaths and Marriages Registration office or relevant Government source from the issuing country), *Deed poll* or other document satisfactory to us.

Who can certify?

- Justice of the Peace (including Commissioner for Declarations)
- Police Officer
- One of the following with two or more years of continuous service
 - a) Australia Post permanent employee
 - b) Financial Institution Officer e.g. bank employee
 - c) Australian Financial Services Licensee, authorised representative or officer.

For a full list of who can certify, please refer to the *Proof of identity* factsheet on our website.

What do we mean by certified?

We understand you'll want to provide us with copies of your ID documents, rather than the originals. That's fine, but you must have them 'certified'. This means the certifier must:

- 1.** Sight the original and the copy to make sure both documents are identical, and
- 2.** Write or stamp 'certified true copy of original document' on each page, and
- 3.** Sign and print their name, qualification (e.g. Justice of the Peace, Australia Post permanent employee), and the date on each page of the document.

The example below shows how your proof of identity document should look:

- a)** Copy of the document that identifies you,
- b)** Displays 'Certified true copy of original document' written or stamped and signature of authorised person,
- c)** Authorised person's stamp and registration number (if applicable),
- d)** Name, qualification and phone number of authorised person, and
- e)** Date of authorisation.



Important notes on identification:

- We cannot accept documents which have expired. If an expired document is received, we won't be able to process your *Change of details* form until suitable identification has been provided.
- If you're providing a document that isn't in English, you'll also need to provide an English translation prepared by an accredited translator. For further information on this, please call us on **13 11 84**.

Signing on behalf of the member

If you're signing on behalf of the member you'll need to provide a certified copy of the Power of Attorney documentation or Guardianship papers.

Who can I nominate as a beneficiary?

You can nominate a dependant or your legal personal representative. If you nominate your legal personal representative it's important that you have a Will and keep it up-to-date, as the Trustee must pay your death benefit to your estate.

Under superannuation law, "dependants" include the following:

- any spouse (including a same-sex spouse),
- any child (including a child of a spouse),
- any person in an 'interdependent relationship' with you, or
- any other person who the Trustee considers was dependent on you for maintenance or support, at the date of your death.

Someone can be in an interdependent relationship with you if:

- you have a close personal relationship,
- you live together,
- one or each of you provides the other with financial support, and
- one or each of you provides the other with domestic support and personal care.

Dependency can also arise where two people have a close personal relationship but don't live together or provide each other with financial support or personal care because of physical, intellectual or psychiatric disability.

For more information on dependants please go to our website sunsuper.com.au.

Who decides?

Under the Trust Deed, the Trustee alone is responsible for deciding to whom, and in what proportion, your death benefit should be paid. In making this decision however, the Trustee will naturally take into account your nomination of preferred beneficiary/s.

If you'd like greater certainty about where your benefit will be paid, you can make a binding death nomination by logging onto our website sunsuper.com.au/forms and downloading a *Binding death nomination* form.

For your nomination to be effective, it is important that you keep it up-to-date, particularly if your family or marital circumstances change.

Refer to the *Proof of identity* fact sheet at sunsuper.com.au/factsheets for further details.

Change of details

Sunsuper Pty Ltd ABN 88 010 720 840 AFSL No. 228975 Trustee of the Sunsuper Superannuation Fund
 Important: Please provide us with as much information as possible.

Use **BLOCK** letters and black ink when completing this form and ensure it is signed and dated.

* Denotes mandatory fields.

Your Sunsuper member number

1 Your current account details

Given names*

Last name*

Other/previous names

Date of birth (dd/mm/yyyy)* Gender* Male Female

Street address/PO Box*

Suburb / Town* State* Postcode*

Country*

Preferred email address

Home phone number Mobile phone number

2 Tax file number (TFN)

I agree to provide my TFN (choose one)

NO

Yes, My TFN is

Under the Superannuation Industry (Supervision) Act 1993, your superannuation fund is authorised to collect your TFN, which will only be used for lawful purposes.

These purposes may change in the future as a result of legislative change. The Trustee of your superannuation fund may disclose your TFN to another superannuation provider, when your benefits are being transferred, unless you request the Trustee of your superannuation fund in writing that your TFN not be disclosed to any other superannuation provider.

It is not an offence not to quote your TFN. However giving your TFN to your superannuation fund will have the following advantages (which may not otherwise apply):

- your superannuation fund will be able to accept all types of contributions to your account/s,
- the tax on contributions to your superannuation account/s will not increase,
- other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your superannuation benefits, and
- it will make it much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

3 Your new contact details (if different from above)

Street address/PO Box

Suburb / Town State Postcode

Country

Preferred email address

Home phone number Mobile phone number

4 Your new personal details (if different from above)

Given names

Last name

Date of birth (dd/mm/yyyy)

Note: If you've changed your name you'll need to provide an original or certified copy of your *Marriage certificate* or *Change of name* certificate issued by the Birth, Deaths and Marriages Registration Office. If your date of birth is different to what we have you'll need to provide an original or certified copy of your identification. Please read the Proof of identity section on page 2 of this document.

5 Member Online

As a member of Sunsuper, you can access your account on the Sunsuper website through *Member Online*. If you don't have access to *Member Online* already, tick this box and your access details will be forwarded to you.

I'd like to register for *Member Online*.

Please turn over and continue 

Change of details

6 Change of beneficiaries

I nominate the people below as my preferred beneficiaries for the payment of my death benefit from Sunsuper. I understand my preferred nomination will be used by Sunsuper as a guide only and that Sunsuper is not bound by my nomination when exercising its absolute discretion to pay my death benefit.

Title	<input type="text"/>	Given names	<input type="text"/>
Last name	<input type="text"/>		
Relationship (eg: spouse)	<input type="text"/>	Portion of benefit	<input type="text"/> %
Title	<input type="text"/>	Given names	<input type="text"/>
Last name	<input type="text"/>		
Relationship (eg: spouse)	<input type="text"/>	Portion of benefit	<input type="text"/> %
Title	<input type="text"/>	Given names	<input type="text"/>
Last name	<input type="text"/>		
Relationship (eg: spouse)	<input type="text"/>	Portion of benefit	<input type="text"/> %
Title	<input type="text"/>	Given names	<input type="text"/>
Last name	<input type="text"/>		
Relationship (eg: spouse)	<input type="text"/>	Portion of benefit	<input type="text"/> %

If more than four beneficiaries are required please attach details separately.

Must be whole numbers and add up to TOTAL 100%

Binding nomination

You can make a binding death benefit nomination by completing a *Binding death benefit nomination* form instead of the section above. A binding nomination is a legal instrument that 'binds' the Trustee of Sunsuper to pay your death benefit to your nominated beneficiaries in most cases. If you would like a *Binding death benefit nomination* form, visit [sunsuper.com.au/forms](https://www.sunsuper.com.au/forms).

I wish to make a binding death nomination and have attached a completed *Binding death benefit nomination* form.

7 Checklist

We'll update your details as soon as we can. However, it's important to make sure you give us all of the information and documents we need to do this.

- Have you read page 1 and 2 of this document?**
- Have you completed all of the mandatory fields on the form?**
- Have you changed your name?**
If you've changed your name you'll need to provide a certified copy of your *Marriage certificate* or *Change of name certificate* issued by the Birth, Death and Marriages Registration Office. Please refer to page 2 of this document.
- Have you changed your date of birth?**
If you've changed your date of birth, you'll need to provide a certified copy of your identification (e.g. Drivers licence). Please refer to page 2 of this document.
- Are you signing on behalf of the member?**
If you're signing on behalf of the member, you'll need to provide an original or certified copy of Guardianship papers or Power of Attorney documentation.
- Have you signed and dated this form?**
If you are under the age of 18 your parent or guardian will need to sign the form too.

8 Authorisation

I declare that all the details on this *Change of details* form are correct.

Full name (print in BLOCK letters)*

Note: If you are under the age of 18 your parent or guardian will need to complete section 9.

Member to sign here*

Date (dd/mm/yyyy)*

9 Authorisation signed on behalf of the member

I declare:

- I am authorised to sign on behalf of the member and have attached an original or certified copy of Guardianship or Power of Attorney papers, or
- I'm signing on behalf of (or in addition to) a member under the age of 18 as their parent or guardian and have attached appropriate proof of parent or guardianship, such as a certificate of birth or adoption papers.
- that all the details on this *Change of details* form are correct.

Full name (print in BLOCK letters)*

Sign here on behalf of the member

Date (dd/mm/yyyy)

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](https://www.sunsuper.com.au).