


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: 

Not registered?

Register for online access and keep an eye on your super and manage it whenever you want, from wherever you are.

Visit: sunsuper.com.au/register

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

1 Your current account details

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

If you're not sure if you have already supplied your Tax File Number (TFN) you can add it now. Before you supply your TFN, please read the TFN section on page 2. 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.

2 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* or the Sunsuper app.

3 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.

4 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/beneficiary

5,6 *Income accounts (only)*

If you want to update your payment details for an *Income account* and want to change your bank account details, this section is specifically for you to complete.

What's an *Income account*? Super can be accessed using a *Sunsuper for life – Income account* generally when a member retires or reaches their preservation age. To find out more about accessing your super using an *Income account* visit sunsuper.com.au/accessmysuper or section 1 of the *Sunsuper for life guide*.

7,8,9,10 Checklist and authorisation

Use the checklist to double check everything is complete. Complete the financial adviser section if you want us to contact your adviser about the requirements of this form. Read the authorisation statements and sign.

Important information

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*, *Decree Nisi*, *Decree Absolute (Divorce Certificate)*, *Divorce Order* or other document satisfactory to us (linking document). This document must show both your previous and current names.

Need to correct your date of birth?

If you're correcting or providing your date of birth, you must provide a certified copy of one of the following identification documents showing your correct date of birth: Drivers licence, passport, national identity card, birth certificate or Australian birth extract.

Who can certify?

- Justice of the Peace (including Commissioner for Declarations),
- Police Officer,
- One of the following with 2 or more years of continuous service:
 - Australia Post permanent employee
 - Financial Institution Officer e.g. bank employee
 - Australian Financial Services Licensee, authorised representative or officer.

For a full list of who can certify, including overseas certifiers, please visit sunsuper.com.au/id

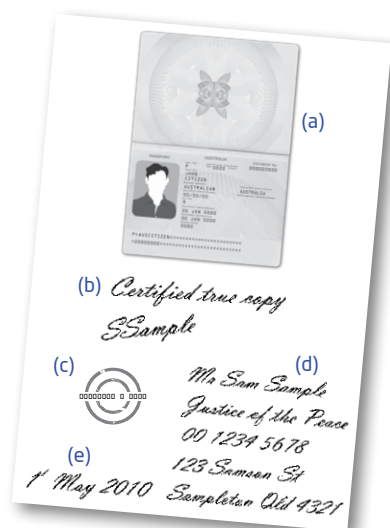
What do we mean by certified?

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' within the last 12 months. This means the certifier must:

- Sight the original and the copy to make sure both documents are identical, and
- Write or stamp 'certified true copy of original document' on each page, and
- 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.

How your proof of identity document should look. (See example above right.)

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

Providing your tax file number (TFN)

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.

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. **Please ensure each page of the document is certified.**

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 visit sunsuper.com.au

Who decides how my benefit is paid?

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 visiting sunsuper.com.au/beneficiary 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.

For further details refer to the *Proof of identity requirements* at sunsuper.com.au/id

Please keep these important information pages for your records.

Change of details

Important: Please provide us with as much information as possible. Please tick box where appropriate. Use **BLOCK** letters and dark ink when completing this form and ensure it is signed and dated. *DENOTES MANDATORY FIELD.

Member number
if already a member

1 Personal details

Title	First name*	Middle name
<input type="text"/>	<input type="text"/>	<input type="text"/>

Last name*	Date of birth (DD/MM/YYYY)*	Gender*
<input type="text"/>	<input type="text"/>	<input type="button" value="M"/> <input type="button" value="F"/>

Please complete for identity purposes.

Street Address / PO Box*	Country of Birth*
<input type="text"/>	<input type="text"/>

Suburb/Town*	State*	Postcode*	Home phone number	Daytime phone number*
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Personal email address	Mobile phone number
<input type="text"/>	<input type="text"/>

Tax file number (TFN) details

If you're not sure if we have your TFN you can add it below. You don't have to provide your TFN, however if we don't have your TFN, you may pay more tax than you need to. Before you supply your TFN, please read the TFN section on page 2 of the *Important information* pages. If we do have your TFN you don't need to provide it again.

My TFN

Let us find your other super for you

By ticking this box, you consent to Sunsuper using the Australian Tax Office (ATO) SuperMatch service to use your TFN to search for any other super you may have. This super may be with other super funds or held with the ATO. If we find money with the ATO, this will normally be transferred automatically into your Sunsuper account. If we find money with other super funds you'll have the choice of whether you transfer this or not. To help keep track of your super, we'll also conduct an ongoing annual search on your behalf. If at any time you wish to revoke your consent, please contact Sunsuper on 13 11 84.



I wish to change details on my:
(tick all that apply)

Super-savings account

Income account

Corporate account

Business account

2 Your new contact details If different from above

Street Address / PO Box*
<input type="text"/>

Suburb/Town*	State*	Postcode*	Home phone number	Daytime phone number*
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Personal email address	Mobile phone number
<input type="text"/>	<input type="text"/>

3 Your new personal details If different from above

Title	First name*	Middle name
<input type="text"/>	<input type="text"/>	<input type="text"/>

Last name*	Date of birth (DD/MM/YYYY)*	Gender*
<input type="text"/>	<input type="text"/>	<input type="button" value="M"/> <input type="button" value="F"/>

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 Births, Deaths and Marriages Registration Office. If your date of birth or gender 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.

Please continue over page

**If you have an *Income account* and elected a reversionary beneficiary, do not complete this section.**

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.

Given names	Surname	Date of birth (DD/MM/YYYY)*	Gender* (e.g. spouse)	Relationship (e.g. spouse)	Portion of benefit*
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="M/F"/>	<input type="text"/>	<input style="width: 20px; text-align: center; font-size: 0.8em; font-weight: bold; border: none; border-bottom: 1px solid #ccc;" type="text" value="%"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="M/F"/>	<input type="text"/>	<input style="width: 20px; text-align: center; font-size: 0.8em; font-weight: bold; border: none; border-bottom: 1px solid #ccc;" type="text" value="%"/>

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)

Must add up to TOTAL

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

100%

**If you don't have an *Income account* please go to Sections 7, 8 & 9 to complete your form****What's an *Income account*?**

Super can be accessed using a *Sunsuper for life – Income account* generally when a member retires or reaches their preservation age. To find out more about accessing your super using an *Income account* visit [sunsuper.com.au/accessmysuper](https://www.sunsuper.com.au/accessmysuper) or Section 1 of the *Sunsuper for life guide*.

Note: You'll know if you have an *Income account* if you're receiving regular payments from your super. If you don't already have an *Income account*, please turn over to Section 7, 8 & 9 to complete your form and leave Sections 5 & 6 blank.

You can nominate up to two personal accounts in your name for your *Income account* payments to be paid into. If you choose to use two accounts, you need to nominate the amount of your total payment to be paid into your primary account and the remainder will be paid into your secondary account.

Primary bank account to receive your *Income account* payments

Financial institution		Name on the account	
<input type="text"/>		<input type="text"/>	
BSB number	Account number	Type of account	
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Savings account <input type="checkbox"/> Cheque account	
AND I have attached: <input type="checkbox"/> a copy of a document prepared by my Australian bank or credit union showing my BSB number, account number, name on the account and address, and is no more than 12 months old.			Payment amount before tax* <input type="text" value="\$"/>

Secondary bank account (only if splitting your payments between two accounts)

Financial institution		Name on the account	
<input type="text"/>		<input type="text"/>	
BSB number	Account number	Type of account	
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Savings account <input type="checkbox"/> Cheque account	
AND I have attached: <input type="checkbox"/> a copy of a document prepared by my Australian bank or credit union showing my BSB number, account number, name on the account and address, and is no more than 12 months old.			Note: Your remaining payment amount will be paid into your secondary account.

Important: For us to pay your benefit into your bank account we require you to provide a bank document (e.g. statement from a bank or online statement) for each account. These documents must be current and **no more than 12 months old** and show your BSB, account number and your name on the account.

Money cannot be paid into a credit card account or a third party account. We'll take care to ensure your money is paid in line with the details you have provided. However, we accept no responsibility for any loss which occurs as a result of incorrect bank account details you provide us.

**All members to complete Sections 7, 8 & 9 below****Use this section to advise the payment amount you would like to receive and how frequently. Changes will be made for your next payment.**

By completing this section I understand I am required to take an amount of income 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 income payments at least equal to this minimum amount.

6 Income account payment details For Income account holders only



Payment amount

I wish to receive payment amounts of

Minimum level¹ —OR— Specific gross amount per payment: \$

Transition to retirement only²

Maximum 10%. Pay me the **full 10% amount** (non pro rata) in the first financial year. —OR— Maximum pro rata 10%. Pay me a **pro rata amount** based on the period remaining this financial year.

Payment frequency

I wish to receive my payments

Fortnightly Monthly (default) Quarterly Half yearly Yearly

I'd like these payments applied from: (DD/MM/YYYY)

Note: If you don't make a choice, you'll receive the minimum level of payment on a monthly basis.

¹ The minimum default level will be aged based as shown in the table in Section 1 of the *Sunsuper for life guide*.

² This option is not available if you're over age 65. If you select the pro rata option you will be paid the maximum amount for the period remaining in the financial year you start your *Income account*. If you select the non pro rata option you will be paid the maximum amount (i.e. 10% of your starting balance in the remainder of the financial year you start your *Income account*).



All members to complete Sections 7, 8 & 9 below

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.

- | | |
|--|--|
| <input type="checkbox"/> Have you read page 1 and 2 of this document? | <input type="checkbox"/> Have you completed all of the mandatory fields on the form? |
| <input type="checkbox"/> Have you changed your name? If you've changed your name you'll need to provide a certified copy of your <i>Marriage certificate</i> or <i>Change of name certificate</i> issued by the Births, Deaths and Marriages Registration Office. Please refer to page 2 of this document. | <input type="checkbox"/> 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. |
| <input type="checkbox"/> Have you corrected your date of birth or gender? If you've corrected your date of birth or gender, you'll need to provide a certified copy of your identification (e.g. Drivers licence). Please refer to page 2 of this document. | <input type="checkbox"/> 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 Financial adviser

- Please communicate with my financial adviser where possible regarding this form. I have attached (or previously provided) a signed third party authority for my financial adviser to access information about my Sunsuper account(s).
- Please communicate with my financial adviser about this form via email. I acknowledge email is not a secure form of communication.

Adviser name/Company:

9 Authorisation and declaration

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 10 below.

Member to sign here*



Date (DD/MM/YYYY)*

10 Authorisation and declaration 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)*

Please return the form to Sunsuper Reply Paid 2924 Brisbane Qld 4001