

Step 2 – Making your initial investment

Do not complete this section if you are topping up your pension account.

I wish to invest the following amount(s) *(select an option ✓)*

Transfer from my other account within this Fund – Member number

Whole amount

Partial amount:

A an amount of \$ **OR**

Leave \$ in my super account*

External roll-in(s) from:

FUND NAME	APPROX VALUE OF TRANSFER	MEMBER NUMBER
	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

* Minimum balance of \$10,000.00 is required to be left in your super account.

Note: Your pension will not commence until all of your listed transfers have been received.

If you have more than one external super/pension account with another fund(s), you must complete the following:

- I understand that pension accounts can only receive one lump sum amount, so I require a temporary superannuation account to be set up in this Fund for consolidation purposes, using my personal details provided in this application. This superannuation account will be a personal account with no insurance cover, will be invested in the default investment option, and is to be exited once all external roll-ins (as specified above) have been received and transferred to my new pension account.
- I have provided my Tax File Number (TFN) in Step 1 of this form.

Step 3 – Topping up on your pension account

Do not complete this section if you are making an initial investment.

Top up my pension account with the following additional funds from my other account within this Fund *(select an option ✓)*

Member number

Whole amount

Partial amount:

A an amount of \$ **OR**

Leave \$ in my super account*

* Minimum balance of \$10,000.00 is required to be left in your super account.

Note: Your pension will not commence until all of your listed transfers have been received.



Step 4 – Investment choice and payment options

You can choose one or more investment options in any whole percentage. Please ensure the total adds up to 100% otherwise the default investment option(s) will apply as described in the PDS:

- **New members** – RetirePlus investment option
- **Existing members of this Fund** – as per your existing investment allocation

Pension Payments

If you do not make any election for the drawdown of your pension payments, your payments will be drawn proportionally across your selected investment(s).

Investment option	For my account balance	For my pension payments
	% to be invested	% to be drawn
Managed Choice		
Growth Plus	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Growth	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Balanced Growth	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Balanced Plus	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
PositiveIMPACT	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
RetirePlus	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
RetireStable	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Build Your Own options		
Australian Shares	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Overseas Shares	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Property	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Diversified Fixed Interest	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Cash	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
TOTAL	1 0 0 %	1 0 0 %

Please note: If your selected investment option(s) for payment run out, future payments will default proportionately across your remaining investment options.



Step 8 – Reversionary beneficiary nomination

Before your pension starts, you can nominate your spouse as a reversionary beneficiary. This means that if you die with money in your account, your spouse will continue to receive your pension, as long as he or she is your spouse at the time of your death.

You cannot change your reversionary beneficiary once your pension starts.

If you do not wish to nominate a reversionary beneficiary (or the nominated reversionary beneficiary dies before you or ceases to be your spouse) you may make a binding death benefit nomination to determine which of your dependants (or your legal personal representative) the balance of your account is to be paid to and in what proportion.

If you wish to nominate a reversionary beneficiary please provide details below.

Given names

Surname

Date of birth

Step 9 – Proving your identity

I have attached certified proof of identity documents.

For full details on completing proof of your identity, please refer to the *Proof of identity* factsheet on our website at mylifemypension.com.au/factsheets or call our Service Centre on **1300 963 720**.

Step 10 – Complete the checklist

To enable your request to be processed promptly, please ensure you have correctly completed this form before returning it to the fund.

Have you:

- Provided your member details in **Step 1**?
- Attached supporting documentation for any change of name, date of birth, or address detailed in **Step 1**?
- Provided complete payment instructions in **Step 5**?
- Signed and dated the form in **Step 11**?
- If you are required (or choose) to provide proof of identity, select the identification you have provided:
 - Current drivers' licence OR current passport; or
 - One document from list one and one document from list two. Further details provided on *Completing proof of identity* fact sheet
- Is your identification current? If providing an Australian Passport, one that has expired within the last two years is acceptable.
- Do your documents need to be certified? If so, ensure the certifier has included ALL of the following on each page:
 - Written or stamped 'certified true copy'
 - Signature and printed name
 - Date – the date MUST be within twelve months of the date we receive your completed form.
 - Qualification (such as Justice of the Peace, Australia Post employee, etc)

Please refer to the *Proof of identity* factsheet on our website at mylifemypension.com.au/factsheets or call our Service Centre on **1300 963 720**.



Step 11 – Sign the form

Your application will not be accepted unless you have signed this declaration.

By signing this form, I:

- apply to become a member of MyLife MyPension
- have attached a completed Tax File Number declaration from the Australian Tax Office (if applicable)
- acknowledge that I have read and understood the Product Disclosure Statement and agree to be bound by it
- acknowledge that I have received all information I require in order to exercise the choices I have made
- accept that I will be bound by the provisions of the Trust Deed and rules which govern the operation of MyLife MyPension
- have read the Fund's privacy guide available at mylifemypension.com.au/privacy. I understand and consent to my personal information being collected and used by the Fund in accordance with the privacy guide.
- acknowledge that if I've provided my email address and mobile telephone details in this application form, the Trustee may, at its discretion, use those contact details to send information, including notification of any annual reports, member and exit statements and notices of any material changes or the occurrence of significant events, by electronic means.
- understand and consent to my information being collected, disclosed and used in the manner set out in this form.

Signature

X

Date

□□ / □□ / □□□□

Please return your completed form, your proof of identity, and any other documentation to MyLife MyPension, GPO Box 4303, Melbourne, VIC 3001.

Adviser Checklist:

Please tick what documents have been attached:

- Application for a Pre-Retirement Pension
- Application for Lump Sum Withdrawal form
- Request for Benefit Payment form (cash out and re-contribution)
- Binding Death Benefit Nomination
- Tax File Number declaration form
- Withholding Tax Variation form
- Additional forms
- Certified proof of identity

Adviser Note:

