



## Step 2 – Complete preservation declaration

**(Select an option)**

- I have reached preservation age\*, ceased employment, and permanently retired# from the workforce.
- I am at least 60 years of age and I have ceased employment since attaining age 60.
- I am at least 65 years of age.
- I am no longer in paid employment due to total and permanent disablement (the Trustee will require supporting evidence as to your medical condition in permanent incapacity).

\* Your preservation age depends on your date of birth – see the table below:

Date of birth	Preservation age
Before 1 July 1960	55
1 July 1960 to 30 June 1961	56
1 July 1961 to 30 June 1962	57
1 July 1962 to 30 June 1963	58
1 July 1963 to 30 June 1964	59
1 July 1964 or after	60

# Permanently retired is defined as never being gainfully employed again for more than 10 hours per week. Gainful employment means employed or self-employed for gain or reward in any business, trade, profession, calling, occupation or employment.

## Step 3 – 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:

An amount of \$                      OR

Leave \$                      in my super account\*

External roll-in(s) from:

**Fund name**

**Approx value of transfer**

**Member number**

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\* Minimum balance of \$2,000.00 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 4 – 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:

An amount of \$                      OR

Leave \$                      in my super account\*

\* Minimum balance of \$2,000.00 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 5 – Choosing the Pension Default Strategy for your Retirement Pension

Complete this step if you would like to choose the Pension Default Strategy for your Retirement.

- I choose to invest my account balance and future pension payments in the Pension Default Strategy. I understand that:
- The Pension Default Strategy applies to my account balance and pension payments
  - My pension payments will be drawn down from the Pension Default Cash option
  - My account balance may be rebalanced at every quarter to align my investments with the Pension Default Strategy.

**If you have completed this step, please proceed to 'Step 7 – Your pension payment details'.**

## Step 6 – 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** – Pension default strategy
- **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
<b>Managed Choice</b>		
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	<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"/> %
<b>Build Your Own options</b>		
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"/> %
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"/> %
<b>TOTAL</b>	<b>1 0 0 %</b>	<b>1 0 0 %</b>

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



## Step 7 – Your pension payment details

### 1. Select your payment frequency

How often do you wish to receive income payments?  Fortnightly  Monthly\*  Quarterly\*  Half-yearly\*  Yearly\*

\* Please nominate the first month in which your payment is to commence:  M  M /  Y  Y

### 2. Select your payment amount

I wish to receive pension payments as follows: **(Select one option only)**

Minimum amount permitted

Nominated amount# of \$    ,    per period as indicated above

Specific annual percentage#    % (The percentage amount nominated will be calculated using the opening balance of your account. This nominated percentage amount will remain on your account until you elect to change it via a *Request to Vary Your Pension Payment* form).

# This amount must be at least the minimum amount permitted and will be gross of tax where applicable.

#### Please note:

- If you have not ticked an option above, payments will be made at the minimum amount permitted.
- Your first pension payment will be paid on the first available pay period after your pension account has been established.
- Monthly, Quarterly, Half-yearly and Annual payments are paid on the 28th day of each respective month.

## Step 8 – Complete your payment details

My bank account details are as follows:

#### Name of Bank/Institution

#### BSB

#### Account Number

#### Account Name\*

\*The account nominated above must be in your name and must be an account for which you can sign to withdraw, either solely or with another person.

## Step 9 – Nominate your beneficiaries

### Who'll get your super if you die while you're in MyLife MyPension?

If you die while there is money in your MyLife MyPension account, this money will be paid out to your spouse, dependants or estate.

You have the option of:

- Nominating a reversionary beneficiary (see Step 10)

OR

- Making a binding death benefit nomination by completing the *Binding Death Benefit Nomination* form.

If you do not nominate a reversionary beneficiary or make a binding death benefit nomination, the Trustee will determine to which of your dependants and/or your estate the benefit will be paid.



## Step 10 – 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 name(s)

Surname

Date of birth

## Step 11 – 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](http://mylifemypension.com.au/factsheets) or call our Service Centre on **1300 963 720**.

## Step 12 – 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 7**?
- Signed and dated the form in **Step 13**?
- 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](http://mylifemypension.com.au/factsheets) or call our Service Centre on **1300 963 720**.



## Step 13 – 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 Collection Statement available at [mylifemypension.com.au/privacy](https://mylifemypension.com.au/privacy). I understand and consent to my personal information being collected and used by the Fund in accordance with the Privacy Collection Statement.
- 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.
- authorise the following person(s) to obtain my pension information and discuss this with the Fund:

Spouse Name

Third party Name

Signature

Date

/   /

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

