

Application to transfer

Use of this form

If you're a Division B UK member, you can use this form to apply to commute your pension entitlements and transfer them to the Commonwealth Bank of Australia (UK) Staff Benefits Scheme (CBA UK Scheme). If your pension entitlements are transferred to the CBA UK Scheme you will cease to be a member of Commonwealth Bank Group Super. Commonwealth Bank Group Super is going to be wound up, so it will not be possible to transfer your pension entitlements back to Commonwealth Bank Group Super once the transfer to the CBA UK Scheme has been completed.

Instructions for this form

Read the 'Significant event notice: transfer of your Group Super pension entitlements' provided with this form for more information about the transfer of your pension entitlements.

- If you will be under **age 65** on 25 October 2024, and you are **not a reversionary pensioner** complete Sections 1, 2, 3 and 4
- If you will be **age 65 or over** on 25 October 2024, or you are **a reversionary pensioner**, complete Sections 1, 2, and 4

If the required information is not provided or is incomplete or invalid or outstanding by 3:00pm (AEST) / 5:00am (BST) on 18 October 2024, your pension entitlements will not be transferred to the CBA UK Scheme under this 'individual consent' process. In that case, your pension entitlements will automatically transfer to Australian Retirement Trust instead, unless Australian law is changed in time, in which case your pension entitlements will automatically transfer to the CBA UK Scheme.

Complete this form using **BLACK INK** and print within the boxes in **CAPITAL LETTERS**. Mark appropriate option boxes with a cross like the following **X**.

Fields marked with an asterisk (*) must be completed due to anti-money laundering and counter-terrorism laws.

Section 1: Member details

Pension/Member number

Title: Mr Mrs Ms Miss Other

*Full given name(s)#

*Surname#

Please provide relevant certified documents if details have changed

Date of birth (dd/mm/yyyy) *Occupation (if retired, state **RETIRED**):

*Mobile number Email

▶ By providing your **email**, you consent to receiving communications to this email, although from time to time we may still need to send you information by post. Note: If no mobile number, you must provide a daytime contact number.

*Residential address – **PO Box is not acceptable**

Flat number House number Street name

Town County

Post code Country

*Main country of residence

Postal address – **cross one option only.**

Same as residential address shown above. Same as existing postal address on account. Different postal address, as provided below:

PO Box number Flat number House number Street name

Town County

Post code Country

Section 2: Commutation and transfer details

Cross (X) the box to apply to commute your pension entitlements to transfer them to the CBA UK Scheme.

By crossing this box you:

- Apply to Commonwealth Bank Officers Superannuation Corporation Pty Limited (Group Super trustee) to have your pension entitlements as a lifetime pensioner under Division B of Commonwealth Bank Group Super commuted in exchange for a lump sum benefit for sole use by the Group Super trustee to establish equivalent pension entitlements under the CBA UK Scheme.
- Irrevocably direct the Group Super trustee to pay the lump sum benefit to the trustee of the CBA UK Scheme, to establish equivalent pension entitlements for you under the CBA UK Scheme. That means that this application, if accepted, will not entitle you to be paid the benefit or to require the benefit to be dealt with other than by way of payment to the trustee of the CBA UK Scheme for the specific purpose noted above.
- Acknowledge that, while the Group Super trustee currently expects to be able to accept most and possibly all of the applications it receives, the Group Super trustee will decide whether to accept your application having regard to the contents of your application and the circumstances prevailing at the time of its decision.
- Acknowledge that your application cannot be withdrawn any later than 3:00pm (AEST) / 5:00am (BST) on 18 October 2024.

If, after submitting your application, you change your mind and wish to withdraw it, we must receive a signed written withdrawal request from you by 3:00pm (AEST) / 5:00am (BST) on 18 October 2024.

Section 3: Employment status declaration

Complete this section if, on 25 October 2024, you will be **under the age of 65** and you are **not a reversionary pensioner**.

Cross (X) the box that best describes your situation (choose one option):

- I ceased to be gainfully employed* when or after I reached 60 years of age. You can choose this option IF an arrangement you were gainfully employed under ceased at any time when you were age 60 or over; it does not matter if you have subsequently become gainfully employed again under another arrangement.
- I ceased to be gainfully employed* before I reached 60 years of age AND I do not intend to become gainfully employed again for 10 or more hours per week. You cannot choose this option if you are currently gainfully employed for 10 or more hours per week.
- Neither of the situations outlined above applies to me.

*Gainfully employed means employed or self-employed for gain or reward in any business, trade, profession, vocation, calling, occupation or employment.

Section 4. Declaration and signature

I declare and agree that:

- The information I've given in this application is correct and complete.
- I have received and read the 'Significant event notice: transfer of your Group Super pension entitlements' provided with this form.
- I have been offered independent guidance and the opportunity to obtain financial advice.
- Commuting my pension entitlements so that they can be transferred to the CBA UK Scheme in accordance with the irrevocable direction given in this form will constitute a complete discharge to the Group Super trustee. Once the transfer to the CBA UK Scheme has been completed, the Group Super trustee will not owe me, my family or dependants any benefits from Commonwealth Bank Group Super.
- I understand and consent to my information being collected, disclosed and used in accordance with Commonwealth Bank Group Super's privacy policy, which is available by contacting us or visiting oursuperfund.com.au/privacy.

Your application may be authorised by you signing it, or a person or persons holding an appropriate power of attorney signing it. Depending on method of authorisation to be used, please sign in the relevant section below. You may sign this form with an original signature; or electronically by applying a scanned copy of your original signature or a digital replica of your original signature. By signing this document electronically, you acknowledge that the document will have the same effect and that you agree to the contents of this document.

Signing by you

Signature of member

Print name

Date

Signing by a person(s) holding power of attorney

When you return this form, you must also provide a duly certified copy of the power of attorney. Each page of the power of attorney must be certified. Each attorney must also supply a certified copy of a primary photographic identification document that contains a sample of their signature, e.g. passport, or other alternative identification. For a copy of our *Completing proof of identity/certifying documents guide* visit oursuperfund.com.au/factsheets then click 'Identity documents'.

If the power is to be exercised jointly by more than one (1) attorney, each attorney must sign. Each attorney declares that they have not received notice of revocation of the power.

Signed for

[insert member's name] by their attorney(s) under power of attorney:

Signature of attorney:

Print name

Date

Sign below only if the power is to be exercised jointly by more than one (1) attorney

Signature of attorney:

Print name

Date

Signature of attorney:

Print name

Date

Requirements for anti-money laundering and counter-terrorism financing laws

We're required to comply with these laws, which include the need to establish your identity and if applicable, the identity of anyone else associated with your account before we can pay any super benefits to you in cash. We will ask you to provide identification if we haven't received verification of your identity previously. We may be required to report information about you to the relevant authorities. We may not be able to tell you when this occurs. We may not be able to transact with you or other persons. This may include delaying, blocking, freezing or refusing to process a transaction or ceasing to provide you with a product or service.

Return your completed form to Commonwealth Bank Group Super

Mail: Commonwealth Bank Group Super Pension Payroll Department, Maclaren House, Talbot Road, Stretford, Manchester, M32 0FP United Kingdom

Email: cbasuperoperations@mercer.com