

# Change of details – Retirement Access

Call us on **1800 023 928** with any questions or visit [oursuperfund.com.au](http://oursuperfund.com.au).

## Use of this form

Use this form to change your personal details, pension payment details or your online account access for your Retirement Access account.

Please indicate your reason(s) for completing this form:

- Change address – complete sections 1, 2, 6
  Change pension details – complete sections 1, 4, 6  
 Change name – complete sections 1, 3, 6
  Provide tax file number – complete sections 1, 5, 6

## Section 1: Member details

Account number

Title:  Mr  Mrs  Miss  Ms Other

Full given name(s)  Surname

Date of birth  Mobile number  Email

► By providing your **mobile**, you consent to its use for security validations, e.g. to transact online. By providing your email, you consent to receiving communications such as newsletters, significant event notices and other important information to this email, although from time to time we may still need to send you information by post. Note: If no mobile, you must give a daytime contact number.

## Section 2: Change of address – complete only if you're changing these details

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

Unit number  Street number  Street name

Suburb  State  Post code  Country

Postal address – cross **one** option only, to be used for all written communications, including cheque payments if applicable

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

Unit number  Street number  PO Box  Street name

Suburb  State  Post code  Country

## Section 3: Change of name – complete only if you're changing these details

If your name has changed, you **must attach a certified copy both of the following**: (i) the documentation by which you registered your change of name (e.g. marriage certificate, deed poll or decree nisi (in the case of divorce)) **and** (ii) your passport or driver's licence with your new identity. This documentation must be certified by a Justice of the Peace, solicitor or notary, or additional certification options are outlined in our 'Who can certify documents' fact sheet at [oursuperfund.com.au/factsheets](http://oursuperfund.com.au/factsheets).

New title:  Mr  Mrs  Miss  Ms Other

New full given name(s)  New surname

Old signature  New signature

#### Section 4: Change of pension details – complete this section only if you're changing these details

Instead of completing this form, you can update your pension payment amount or frequency by logging into your account online at [oursuperfund.com.au/login](https://oursuperfund.com.au/login).

Changes to pension arrangements generally take effect from the first applicable pay date after we receive and can reasonably process your completed request, or from the first applicable pay date of the next financial year, depending on the option selected in 4A below.

#### 4A. Effective date of change

Indicate below when the pension payment change(s) indicated in this section should take effect:

- Apply this change for the **current** financial year – this applies by default if you don't complete this section
- Apply this change from the start of the **next** financial year

#### 4B. Payment amount

You can change your payment amount but you **must** receive a minimum amount in pension payments each financial year, calculated using your age and account balance as at 1 July of the current financial year, or your pension commencement date if this is your first year. A maximum amount also applies to a Transition to Retirement Income Stream (TRIS) account. Refer to our product disclosure statement (PDS) for Retirement Access ([oursuperfund.com.au/pds](https://oursuperfund.com.au/pds)) for more on minimum and maximum amounts.

Choose **one** of the following payment amount options:

- I wish to receive my **minimum** pension amount payable for the financial year
- I wish to receive my **maximum** pension amount payable for the financial year (maximum only applicable for a TRIS account)
- I wish to receive an amount of \$  per pension payment (gross of tax, if applicable)

#### 4C. Payment frequency

Choose **one** of the following pension payment options:

- Fortnightly (the fund's fortnightly pay dates)
- Monthly (first business day on/after 25th of each month)
- Quarterly (first business day on/after 25th of Mar, Jun, Sep, Dec)
- Half-yearly (first business day on/after 25th of Jun, Dec)
- Yearly ► Month  (first business day on/after 25th of Jun or nominated month as stated)

#### 4D. Bank account to be credited with pension payments – you must be a named account holder

Name of Australian financial institution

Branch number (BSB)

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Account number

Name of account holder(s)

#### Section 5: Provide a tax file number (TFN) – complete this section only if you're providing your TFN

**Important:** Under the Superannuation Industry (Supervision) Act 1993, we are authorised to collect, use and disclose your TFN. We may disclose your TFN to another super provider when your benefits are being transferred, unless you request to us in writing that your TFN is not disclosed to any other super provider. Declining to quote your TFN to us is not an offence. However, giving your TFN to us has the following advantages:

- We will be able to accept all permitted types of contributions to your account.
- Other than the tax that may ordinarily apply, you will not pay more tax than you need to. This affects both contributions to your super and benefit payments when you start drawing down your super benefits.
- It will make it much easier to find different super accounts in your name so that you receive all your super benefits when you retire.

If you complete a TFN declaration for your employer, they are required to notify us of your TFN. If, at any time, you have provided your TFN to your employer for super purposes, they are required to notify us of your TFN when a contribution or allocation is made to your account.

The legal purposes for using a TFN may change in the future. If laws change, the consequences of not providing the TFN may also change.

I agree to provide my tax file number to the fund: --

## Section 6: Declaration and signature – complete in all cases

I declare and agree that:

- The information I have given on this form is correct and complete.
- I undertake to provide the fund with any requested information that relates to my membership and to notify the fund if that information changes.
- Pension payments made in accordance with my payment instructions on this form constitute a complete discharge to the trustee in respect of the amounts paid.
- By providing an email address, I consent to receiving communications, notices, including statements, newsletters and other important information, to my email address, and/or by providing a mobile number, I consent to its use for security validations, and I understand that I can change these contact preferences at any time.
- By providing my tax file number, I consent to its use and disclosure as set out in *Reference Guide: How super is taxed*.
- I have read and understood the Privacy section of *Reference Guide: General information* and I acknowledge and consent to the collection, use and disclosure of my personal information as detailed in that section.
- I agree with the terms and conditions for transacting with the fund as set out in *Reference Guide: General information*.
- If this form is signed under Power of Attorney, the Attorney declares that they have not received notice of revocation of that power. Note: A certified copy of the Power of Attorney should be submitted with this form unless we have already sighted it.
- I understand and consent to my information being collected, disclosed and used in accordance with the fund's privacy policy, which is available by contacting the fund or visiting **oursuperfund.com.au** (under the 'Privacy' link on the homepage).

Signature

Print name

Date

**Return your completed form, and any other required forms to:**  
**Mail:** Commonwealth Bank Group Super, GPO Box 4303, Melbourne VIC 3001  
**Email:** please log in to your account and use the online enquiry form.

Member interests in Commonwealth Bank Group Super (the fund) (ABN 24 248 426 878) are issued by Commonwealth Bank Officers Superannuation Corporation Pty Limited (the trustee) (ABN 76 074 519 798, AFSL 246418).