

## Guidelines for completing this form

### This form can be used to:

- > advise your tax file number
- > cancel a direct debit arrangement with AGEST
- > advise changes or corrections to your
  - contact details
  - name
  - date of birth
  - eligible service date
  - preferred beneficiaries
  - pension payments (for allocated pension members)

### To notify AGEST of any changes:

- > complete your current membership details in Section 1
- > complete the relevant section(s) with your new details
- > sign the form at Section 10
- > collate any documents requested to support the change
- > return the supporting documents and this form to:  
**AGEST Administration**  
**Locked Bag 20**  
**Wollongong NSW 2500**

## Certification of personal documents

All copied pages of **ORIGINAL** proof of identification documents (including any linking documents as described later on this page) need to be certified as true copies by any individual approved to do so (see below).

The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (eg Justice of the Peace, Australia Post employee, etc) and date.

### The following can certify copies of the originals as true and correct copies:

- > a pharmacist or teacher
- > a permanent employee of Australia Post with five or more years of continuous service
- > a finance company officer with five or more years of continuous service (with one or more finance companies)
- > an officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having five or more years continuous service with one or more licensees
- > a notary public officer
- > a police officer
- > a registrar or deputy registrar of a court
- > a Justice of the Peace
- > a person enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia, as a legal practitioner
- > an Australian consular officer or an Australian diplomatic officer
- > a judge of a court
- > a magistrate, or a Chief Executive Officer of a Commonwealth court.

## Have you changed your name or are you signing on behalf of another person?

If you have changed your name or are signing on behalf of the applicant, you will need to provide a certified linking document. A linking document is a document that proves a relationship between two (or more) names.

The following table contains information about suitable linking documents.

Purpose	Suitable linking documents
Change of name	Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office.
Signed on behalf of applicant	Guardianship papers or Power of Attorney.

### You should contact us on 1300 724 378 if you are unable to provide this proof of identity.

#### Please note that:

- > the identification documents you supply will be stored securely and will only be used for the purpose of proving your identity in relation to this benefit
- > your identification details may be independently verified
- > faxed copies of certified documents are not acceptable
- > you should not send original identification documents.

## Providing us with your Tax File Number (TFN)

You do not have to provide your TFN but if you don't, there will be a number of implications:

- > AGEST will be prohibited by law from accepting personal after-tax (non-concessional) contributions from you.
- > Any concessional contributions received for you will be taxed at 46.5% (that is, the normal 15% contributions tax + an additional 31.5% penalty tax).
- > it may be more difficult for AGEST to locate and amalgamate your superannuation benefits in the future, and to pay your full benefit entitlement.
- > the Australian Taxation Office (ATO) may be unable to pay you a co-contribution.
- > your superannuation benefit may be taxed at a higher rate than necessary when you withdraw your benefit from the fund.

Further details on providing your TFN are located on AGEST's Product Disclosure Statement (PDS).

Your TFN can be provided on the form attached. You can also provide your TFN by:

- > logging into your account at [www.agest.com.au](http://www.agest.com.au)
- > calling us on 1300 724 378.

## Privacy

AGEST handles your personal information in accordance with a set of National Privacy Principles. AGEST's privacy policy is available in our PDS and on our website, [www.agest.com.au](http://www.agest.com.au), or you can call us for a copy on 1300 724 378.

## 1. Your personal details

Membership Number

Title (please tick)

Miss
  Ms
  Mrs
  Mr
  Dr

First name(s)

Family name

Date of birth

Gender

F
  M

## 2. Your NEW contact details

Telephone numbers

Home

Work

Mobile

Home address (street)



Suburb/Town

State/Territory

Postcode

Email Address (work or home)



## 3. Your NEW name

First name(s)

Family name

Please explain briefly why your name has changed and provide a certified copy of a document to support the change, such as your marriage certificate.

## 4. Your correct date of birth

Please explain briefly why your date of birth requires correcting and provide a certified copy of a document to support the change, such as your birth certificate, passport or driver's licence.

## 5. Nomination of preferred beneficiaries

Complete this section if you would like to advise AGEST of your preferred beneficiaries. This nomination will replace any existing beneficiaries already nominated. For further information regarding preferred beneficiaries you should refer to our Product Disclosure Statement (PDS).

### 1.

First name(s)

Family name

Relationship to you

% of benefit

### 2.

First name(s)

Family name

Relationship to you

% of benefit

### 3.

First name(s)

Family name

Relationship to you

% of benefit

### 4.

First name(s)

Family name

Relationship to you

% of benefit



6. Your correct Eligible Service Date

Grid for service date

Please explain briefly why your eligible service date has changed and provide a copy of a document to support the change, such a letter from your employer.

Text area for explanation

7. Cancelling a Direct Debit arrangement

Please tick this box if you would like to cancel a direct debit arrangement with AGESt. The direct debit will be cancelled in accordance with your Direct Debit Agreement.

8. Providing us with your Tax File Number (TFN)

I have read the information on this form about my Tax File Number and I choose: (please tick)

Form for TFN provision choice and number

9. Pension Payments

Please complete this section if you wish to change your existing pension payment instructions.

> New Bank Account

The account must be in the primary pensioner's name or in joint names. Any financial institution with a BSB is acceptable.

Name(s) in which the account is held

Name of Financial Institution

Name of Branch

Bank Address

Suburb/Town

State/Territory and Postcode

Bank/State/Branch (BSB) Number and Account Number

> New Pension Payment Frequency (please tick)

Frequency options: Monthly, Quarterly, Annually

Commencing on: 15

> New Pension Amount (please tick)

Pension amount options: Minimum, Maximum, Other amount

PLEASE NOTE

Requests to change your pension details must be received at least 5 business days before the due date of the next pension payment or your request to change details may not be completed before the next payment has been processed.

If you wish to change your investment options or the way in which your regular pension payments are drawn from the investment options you have selected, you will need to complete an Investment Choice Application or you can update your selections by logging in to your account online at www.agest.com.au

10. Authorisation

By signing this form I am making the following statements:

- I declare I have fully read this form and the information completed is true and correct.
I authorise AGESt to update the relevant records as instructed on this form.

Signature

Signature box

Date

Date box

Please send this form to:

AGESt Administration
Locked Bag 20
Wollongong NSW 2500