

Guidelines for completing this form

This form can be used to:

- ▶ advise AGEST of 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
 - non-binding beneficiaries
 - pension payments (for 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 5
- ▶ 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 people can certify copies of the originals as true and correct copies:

- ▶ a Pharmacist
- ▶ a Teacher employed on a full-time basis at a school or tertiary education institution
- ▶ 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 as follows:

- ▶ 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.agemst.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.agemst.com.au or you can call us for a copy on 1300 724 378.

1. Personal Details

Membership Number

Date of birth

Gender

 F M

Title (please tick)

 Miss Ms Mrs Mr Dr

First name(s)

Family name

2. NEW Personal Details

2(a) 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.

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2(b) 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.

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2(c) Your Tax File Number

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

 to provide my TFN - it is
 not to provide my TFN

2(d) Your NEW Contact Details

Telephone numbers

Home

Work

Mobile

Residential address

Suburb/Town

State/Territory

Postcode

Email Address (work or home)

2(e) Your Eligible Service Period Start Date

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

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