

Change your Managed Pension to a Control Pension

1800 005 166
info@spiritsuper.com.au
GPO Box 1547, Hobart TAS 7001

Use this form to change some or all of your Managed Pension to a Control Pension.

Before you complete this form you should:

- read our *Pension guide* available at spiritsuper.com.au/pds
- consider whether a Control Pension is appropriate to your personal circumstances
- seek personal advice to confirm if this change will have tax or social security implications.

Important information

With a Control Pension, you choose your pension amount, payment frequency and how your savings are invested.

Your Control Pension payments will be paid to the same bank account that your Managed Pension is paid. Contact us if you need to change your bank account.

Your current beneficiary nomination in your Managed Pension will be applied to your new Control Pension. If you'd like to change your nomination, our forms are available at spiritsuper.com.au/forms, or contact us for more information.

We may need to make an additional pension payment before we change your pension to ensure you meet minimum requirements.

Section 1 Your details

Member number

Account number

Date of birth (DD MM YYYY)

Last name

First name

Middle name/s

Residential address

Suburb/Town/City

State

Postcode

Preferred phone

Email



Section 2

Change to a Control Pension

You need at least \$20,000 to open a Control Pension.

Change the following amount from a Managed Pension to a Control Pension:

my full account balance.

Your account number will stay the same, however your pension payments and investments will change.

OR

an amount of \$

- To keep your Managed Pension account open, you need to leave a balance of at least \$6,000, or your minimum annual pension amount less payments already received this financial year, whichever is greater. We may adjust the amount specified above to meet these requirements.
- Your Managed Pension account number will stay the same, but you'll receive a new account number for your new Control Pension.
- You'll receive two sets of pension payments – you'll continue to receive your fortnightly Managed Pension and you'll also receive a pension from your Control Pension.

Section 3

Set up your Control Pension

I want to receive my payments: Select one option.

fortnightly, paid every second Thursday.

monthly, paid on the 20th of each month.

quarterly, paid on the 20th of every third month.

Month of next payment:

twice-yearly, paid on the 20th of every sixth month.

Month of next payment:

yearly, paid on the 20th of your chosen month:

For accounts starting between 1 June and 30 June, would you like to defer your first payment until the next financial year?

Yes No

How much do you want to receive?

The minimum amount required.

An amount of: \$ each payment, before tax.

We may adjust the amount to satisfy the minimum and maximum requirements. Tax may be payable if you're under 60.

Example: if you want to receive \$500 each fortnight, write \$500 above and place an X in the fortnightly payment option.

How do you want your account invested?

Tell us how to invest your opening account balance in **column A**. If you don't tell us, you'll be invested in the Cash option.

Use **column B** to tell us which investment option you'd like us to pay your future transactions from, including your pension payments, withdrawals and fees. If left blank, we'll draw your pension proportionately from your investments.

You can change your investment options in **Member Online**, by completing a *Change your pension investments* form or by calling us on **1800 005 166**.

Investment option	A. Opening account balance	B. Future transactions
Growth	%	%
Sustainable	%	%
Balanced	%	%
Moderate	%	%
Conservative	%	%
Australian shares	%	%
International shares	%	%
Diversified fixed interest	%	%
Cash	%	%
Total	100%	100%

Section 4 Member declaration

I apply to become a member of Spirit Super's Control Pension and I acknowledge that:

- I've fully read and understood this form, and the information I've provided is true and correct
- my first payment will be made in the next available payment run
- I'll be bound by the policies, procedures, trust deed and rules that govern Spirit Super and relevant laws
- I consent to the use of my personal information as outlined in Spirit Super's *Privacy policy* available at spiritsuper.com.au/privacy-policy or by calling us on **1800 005 166**
- I've received, read and understood the latest *Pension guide* and agree to be bound by it
- the trustee has advised me to obtain personal financial advice and I've received all the information I need to understand the choices I've made.

Your signature

Date (DD MM YYYY)

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Return the completed, signed and dated form to info@spiritsuper.com.au or Spirit Super, GPO Box 1547, Hobart TAS 7001.

