

# Change your Control Pension to a Managed Pension

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GPO Box 1547, Hobart TAS 7001

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

**Before you complete this form you should:**

- read our *Pension guide* available at [spiritsuper.com.au/pds](https://spiritsuper.com.au/pds)
- consider whether a Managed 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 Managed Pension, your fortnightly pension amount and investments are set for you, aiming to provide you with stable, regular payments until age 90 (but this isn't a guarantee), which are generally indexed to keep pace with inflation. We'll confirm these details once your Managed Pension has been set up.

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

Your current beneficiary nomination in your Control Pension will be applied to your new Managed Pension. If you'd like to change your nomination, our forms are available at [spiritsuper.com.au/forms](https://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 Managed Pension

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

Change the following amount from a Control Pension to a Managed 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 Control 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 Control Pension account number will stay the same, but you'll receive a new account number for your new Managed Pension.
- You'll receive two sets of pension payments – you'll continue to receive your Control Pension amount at the current frequency and you'll also receive fortnightly payments from your Managed Pension.
- The amount transferred into your new Managed Pension will be paid in line with the future transaction strategy you've chosen in your Control Pension account.

## Section 3 Member declaration

I apply to become a member of Spirit Super's Managed 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](https://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)



Return the completed, signed and dated application form to [info@spiritsuper.com.au](mailto:info@spiritsuper.com.au) or Spirit Super, GPO Box 1547, Hobart TAS 7001.

