



## Section 2 Your current situation

Place an X in the box below that applies to you. Select one only.

I'm over 65 years of age.

I'm aged 60–64 and have ended an employment arrangement since turning 60.

Date your employment arrangement ended (DD MM YYYY)










I've reached my preservation age and I'm still working. I'm applying for a Transition Pension.

Don't complete section 5.

I've reached my preservation age and have permanently retired. I don't intend to work again for 10 or more hours a week.

Date of retirement (DD MM YYYY)









Date of birth

Preservation age

Before 1 July 1960

55

1 July 1960 – 30 June 1961

56

1 July 1961 – 30 June 1962

57

1 July 1962 – 30 June 1963

58

1 July 1963 – 30 June 1964

59

After 30 June 1964

60

## Section 3 Your opening balance

Open my pension account with: Select all that apply. Minimum opening balance is \$20,000.

My existing Spirit Super account number:

















Select one option below.

**Transfer my total account balance.**

This will close your Spirit Super account, and any insurance you have will cease. The final amount paid may vary due to investment earnings, tax and fees. Please check with your employer that any final contributions have gone into your account before you complete this form.

OR

An amount of: \$

















You need to leave at least \$6,000 in your account to keep it open. We may adjust the specified amount to meet this requirement. This transfer will be paid in line with your future transaction investment strategy.

**Super savings in another fund (not Spirit Super).**

You need to combine your super accounts before completing this form. Contact us for more information.

## Section 4 Your bank details

Account name – the account must be held solely or jointly in your name.

Payments can't be made to business accounts or third parties.


































BSB number









Account number

## Section 5 Set up your Managed Pension

Only complete section 5 if you want 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.

If you want to choose your pension amount or how your savings are invested, you need to set up a Transition or Control Pension. Go to **section 6**.

I want a Managed Pension. Go to **section 7**.

We'll confirm the details of your investments and how much you'll receive as your fortnightly pension once your Managed Pension has been set up.

## Section 6 Set up your Transition or Control Pension

Only complete section 6 if you want a Transition or Control Pension.

Don't complete this section if you want a Managed Pension – go back to **section 5**.

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:

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

Month of next payment:

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

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

Yes  No

[continued next page...](#)

**Section 6**  
**Set up your**  
**Transition**  
**or Control**  
**Pension**  
**(continued)**

**How much do you want to receive?** Tax may be payable if you're under 60.

**The minimum amount required.**

The Government has temporarily reduced the minimum pension requirements for the 2020-21 financial year. See our *Pension guide* for more information.

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

We may adjust the amount to satisfy the minimum and maximum requirements.

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

**The maximum amount (for Transition Pensions only).**

The maximum annual pension amount you can receive from your Transition Pension is 10% of your account balance.

**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		%		%
<b>TOTAL</b>		<b>100%</b>		<b>100%</b>

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## Section 7 Choose your beneficiaries

Only certain people can receive super death benefits. See our *Pension guide* for more information.

**Option 1 – reversionary beneficiary**

Your pension payments may continue to be paid to your spouse on your death, or they can choose to cash in the remaining pension as a lump sum.

**Spouse details**

Mr Mrs Ms Miss Dr Date of birth (DD MM YYYY)

Last name

First name

Middle name/s

Residential address

Suburb/Town/City State Postcode

Phone

Email

**Option 2 – keep my existing Spirit Super beneficiary nomination**

If you already have a Spirit Super account, you can apply your existing nomination to your new pension account.

I want to keep the same beneficiary nomination as account number:

If you currently have a valid binding nomination in place, signing this form will renew your binding nomination for a further three years.

**Option 3 – making a binding nomination**

Complete the *Make a binding death benefit nomination* form included in this *Pension guide*.

**Option 4 – making a non-binding nomination**

You can do this in **Member Online**, by completing the *Choose your non-binding beneficiaries* form or by calling us on **1800 005 166**.

## Section 8 Provide proof of identity

Please verify your identity by choosing option 1 or 2.

**Option 1 – I want to use electronic verification**

By completing this section, I authorise Spirit Super to use my details held for the purpose of confirming my identity. I understand that my details will be checked with the relevant official record holder through the use of third party systems.

**Important:** Make sure that the details you provide below exactly match your documents. If the details vary, we won't be able to verify your identity electronically.

Provide details of any TWO of the following:

### 1. Australian driver's licence

Full name as appears on my driver's licence

My Australian driver's licence number

State of issue

Expiry date (DD MM YYYY)

### 2. Medicare card

Full name as appears on my Medicare card

My Medicare number

Valid to (MM YYYY)

Colour of card

Green

Yellow

Blue

Your reference number on this card is

### 3. Australian passport

Full name as appears on my passport

My Australian passport number

**Option 2 – I want to use paper-based verification**

I've provided certified proof of identity with this form. See the *Guide to providing proof of ID* fact sheet for more information.

I authorise Spirit Super to use my personal details for the purpose of confirming my identity if the paper copies of my certified identification documents are incorrectly certified, scanned or unable to be read. I understand that my details will be checked with the relevant official record holder through the use of third party systems.

## Section 9 Keeping up-to-date

Please keep me up-to-date with extra products and services offered to members by Spirit Super, related or other companies. **Note** that if you don't complete this section, we'll assume you agree to receive these communications.

Yes

No

**Section 10**  
**Receive statements and disclosures online**

We make your statements and disclosures available in your **Member Online** Inbox. We'll send you an email to let you know when it's available to download. Once available, you can access these at any time.

You can opt out of receiving your statements and disclosures online by ticking the box below. You can also opt out in **Member Online** or by calling us on **1800 005 166**.

**No. I don't want to receive these online. I want to receive paper copies.**

**Section 11**  
**Member declaration**

**I apply to become a pension member of Spirit Super and I acknowledge that:**

- my first payment will be made in the next available payment run, unless I've nominated a specific date
- I'll be bound by the policies, procedures, trust deed and rules that govern Spirit Super and relevant laws and note that the trust deed prevails if there's any inconsistency
- I've read Spirit Super's Privacy policy available at [spiritsuper.com.au/privacy-policy](https://spiritsuper.com.au/privacy-policy) and understand how my personal information will be used
- I've received, read and understood the *Pension guide* dated 1 April 2021 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
- the information provided by me is true and correct.

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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If you're under age 60, you also need to complete the *Tax file number declaration* form.



Return the completed, signed and dated form to [info@spiritsuper.com.au](mailto:info@spiritsuper.com.au) or Spirit Super, GPO Box 1547, Hobart TAS 7001.  
This application accompanies our *Pension guide* issued 1 April 2021.

