



Change of Member Details

IMPORTANT: Please use BLOCK letters and black ink when completing this form. Read all of the information on the back of this form to help you complete your Change of Member Details correctly. This request will be invalid if not signed and dated.

1. Existing member details

MEMBER NUMBER

Grid of boxes for member number

MR/MRS/MS/MISS SURNAME

Grid of boxes for title and surname

GIVEN NAMES

Grid of boxes for given names

DATE OF BIRTH

Grid of boxes for date of birth

STREET ADDRESS / PO BOX

Grid of boxes for street address

SUBURB / TOWN / CITY

Grid of boxes for suburb/town/city

STATE

Grid of boxes for state

POSTCODE

Grid of boxes for postcode

DAYTIME CONTACT NUMBER

Grid of boxes for daytime contact number

EMAIL ADDRESS (UPPER AND LOWER CASE WHERE APPLICABLE)

Text box for email address

MOBILE

Grid of boxes for mobile number

NOTE: If our records show an incorrect date of birth, evidence must be provided (E.G. copy of driver's license or birth certificate) Evidence of a name change must be attached (E.G. copy of marriage certificate, deed poll or decree nisi) Do not send originals.

2. Preferred Beneficiary/ies (see page 3 for important information)

MR/MRS/MS/MISS

Grid of boxes for title

SURNAME

Grid of boxes for surname

GIVEN NAMES

Grid of boxes for given names

RELATIONSHIP (EG. WIFE SON)

Grid of boxes for relationship

PORTION OF BENEFIT

Grid of boxes for portion of benefit

Must be whole numbers and add to 100 %

I nominate the above person(s) as my preferred beneficiary/ies for the payment of my death benefit in Cashel Super & Pension Plan. I understand that my nomination will be used by the Trustee as a guide only and the Trustee is not in any way bound by my nomination when exercising its absolute discretion to pay my benefit in the Cashel Super & Pension Plan.

If you wish to make a binding nomination you can obtain the form from DIY Master by phoning (07) 5555 5656 or download a copy from the website www.diy-master.com.au

3. Variation to Pension Payment

Payment Amount

Please nominate the gross amount of your annual pension that you would like to receive (this may be subject to income tax)

Minimum Payment

Box for minimum payment

Maximum Payment

Box for maximum payment

Other Payment Amount \$

Box for other payment amount

(Transition to Retirement Pension)

Frequency

Please select the frequency which the gross amount of the annual pension should be paid.

Monthly

Box for monthly

Quarterly

Box for quarterly

Half-Yearly

Box for half-yearly

Yearly

Box for yearly



## Change of Member Details

### 1. Existing Member details

Complete this section in full for all changes. Please don't use initials. Your full name and date of birth will help us to identify your account

### 2. Preferred Beneficiary/ies

Complete this section to change your nominated beneficiary/ies. To make sure that your nomination of preferred beneficiary/ies is valid, please read the following information.

#### Who can I nominate?

Under superannuation law and subject to the Trust Deed superannuation benefits payable in the event of your death may, in the first instance, be paid to of the Plan, your dependants, or to your legal personal representative. If you do not have a dependant or legal personal representative, the Trustee may pay the benefit to an individual, subject to the provision of the Trust Deed of the Plan.

The meaning of 'dependant' is detailed on page 21 of the Member Guide

- your spouse (including de facto);
- your children of any age (including step, adopted or ex-nuptial); or
- any other person who is or was wholly or partially financially dependent on you.

#### Who decides?

Under the Trust Deed, the Trustee alone is responsible for deciding to whom, and in what proportion, your death benefit should be paid. In making this decision however, the Trustee will naturally consider your nomination of preferred beneficiary/ies.

For your nomination to be effective, it is important that you keep it up to date, particularly if your family or marital circumstances change.

### 3. Variation to Pension Payment Amount

Complete this section if you wish to change the amount of pension payment you wish to receive.

### 4. Variation to Payment Instructions

Complete this section if you wish to change the bank account your pension payments are paid into.

### 6. Declaration

You must sign and date the Declaration before returning this form.