

Request to vary your Pension Payment

For members who set up their account with Smart Bundle

The Smart Bundle pension amount and payment frequency settings have been selected to take into account the potential investment returns and investment objectives for Mercer SmartPath as you get older. Changing these settings may change your expected retirement outcomes. You should consider the options that are most suitable for your individual objectives, financial situation or needs. You should get financial advice tailored to your personal circumstances.

If you need help

For assistance, information on your benefit entitlements, or to access the Privacy Policy and your personal information call the Helpline on **1800 671 369**.



This form can be completed digitally or by hand with a black or blue pen in uppercase with one character per box. **Please note** the form must be signed with a pen and submitted by post. The form cannot be signed digitally.

Want to make this quicker and easier?

Did you know you can also do this in your Member Online account? It's faster, easier and more secure for you www.mercersuper.com.au
Having trouble? Here's some troubleshooting information to help get you logged in
www.mercersuper.com.au/member-online-and-mercerc-super-app

Step 1: Complete your personal details

Title: Mr <input type="radio"/> Mrs <input type="radio"/> Ms <input type="radio"/> Miss <input type="radio"/> Other <input type="text"/>	Date of birth <input type="text"/>	
Given names <input type="text"/>		
Surname <input type="text"/>		
Street address <input type="text"/>		
Suburb <input type="text"/>	State <input type="text"/>	Postcode <input type="text"/>
Telephone <input type="text"/>	Mobile <input type="text"/>	
E-mail <input type="text"/>		
Account/Membership number <input type="text"/>	Policy number <input type="text"/>	

Step 2: Changes to your regular pension payments

* For Transition to Retirement Allocated Pensions, the nominated annual pension amount or percentage you choose must be between the minimum and the maximum amounts permitted.

* For Allocated Pensions, the nominated annual pension amount or percentage you choose must be at least the minimum amount permitted.

^ If you nominate a fixed dollar payment amount, you can opt in to receive annual indexation, which means from your first pension payment after 1 July each year, your payment amount increases based on movement in the Consumer Price Index (CPI).

If you do not tick the box for CPI indexation, the default is 0%.

All requests to set up annual CPI indexation must be received no later than 10 business days before 30 June to allow for processing time.

If you choose to receive the allowable minimum (or maximum, if applicable) annual pension, or if you nominate a fixed percentage payment amount, annual CPI indexation is not available.

If you nominate a dollar amount, including CPI indexation, or a percentage that is currently, or in the future becomes, outside the allowable minimum (or maximum if applicable) based on your age and account balance, we will adjust your payment to remain within the allowable limits.

For more information on minimum and maximum amounts permitted and indexation, please refer to the Product Disclosure Statement.

Please change my regular pension payment as follows:

Annual pension amount

I would like to receive my pension as follows **(tick only one box)** ☒

☐ **Minimum annual pension amount** permitted

☐ **Maximum annual pension amount** permitted (Only available for Transition to Retirement Allocated Pensions)

☐ **Nominated annual pension amount** of \$ pa (gross of tax)(*)

☐ Tick here if you wish to increase your nominated amount by Consumer Price Index (CPI) each year.^

☐ **Nominated annual percentage amount** of .00 pa

I wish to receive my pension as follows **(tick only one box)** ☒

☐ **Change my Annual Pension Amount for the remainder of the financial year**

The nominated annual pension amount will apply from the time my form has been received and processed.

☐ **Change my Annual Pension Amount for the complete financial year**

The nominated annual pension amount will be the total amount paid for the current financial year.

Payments you have already received this financial year will be taken into consideration in calculating your pension payments for the rest of the financial year.

Pension payment frequency

I would like my pension to be paid **(tick only one box)** ☒

☐ Twice per month, on or about the 8th and 22nd of each month

☐ Monthly*

☐ Quarterly*

☐ Half yearly*

☐ Annually*

* For all frequencies other than twice per month, please nominate the first month in which your payment is to commence:

15 / /

Step 3 – Confirm your bank account details

Your pension will be paid to the account you nominate below – you must be the named account holder (or one of the named account holders in the case of a joint account). If you do not provide these details, we will be unable to commence your pension payments until you do.

Bank Account Details

Please pay my pension to my nominated account as follows:- **(tick only one box)** ☒

☐ Existing bank account

or

☐ New bank account (provide details below)

Name of institution

Branch name

Account holder name

Branch BSB number

Account number

Branch address

Suburb

State

Postcode

Step 4: Providing proof of your identity

Do you need to provide new certified proof of identity?

Please indicate (✓) if one of the following applies. Please note that if the information provided below does not match our records, your payment will be delayed.

- ☐ You have not provided certified ID previously
- ☐ You have changed your name (either your first or last name) – see below (under Name Change) for the list of specific documents required.
- ☐ Your date of birth was incorrect on our records and has been updated
- ☐ You have changed your bank account details

If you have ticked one of the items above, you will need to provide new certified proof of identity.

The easiest way to do this is as follows:

- photocopy both sides of your current drivers licence or passport
- take the photocopies of your ID and the original of the partly completed statutory declaration to Australia Post* or your local Police station**
- ask them to certify your ID.

* to be able to certify your documents, the Australia Post employee must be a permanent employee of the Australian Postal Corporation

with 2 or more years of continuous service in an office supplying postal services to the public. Australia Post will charge a small fee for each photocopy you need to get certified.

**a police officer, sheriff or sheriff's officer can certify your ID.

The person certifying your ID documents will include the following details on the copy:



←	A clear copy of the document that identifies you (i.e. your driver's licence (front and back) or passport)
Certified true copy ←	Write or stamp 'certified true copy' of the original document
J. Sample ←	The authorised person's signature
Mr John Sample ←	Full name, qualification and registration number (if applicable) of the authorised person
Justice of Peace	
Registration No.123456789	
Date: 01/02/2015 ←	Date of certification (within 12 months of receipt)

Alternatively, you can refer to the Completing Proof of Identity fact sheet on the fund's website at www.mercersuper.com.au for a list of other people who can certify your ID document(s) and witness your statutory declaration.

If you don't have a driver's licence or passport

You will need to provide a certified copy of one document from each of the following groups:

- Birth certificate or birth extract¹
- Citizenship certificate issued by the Commonwealth
- Pension card issued by the Department of Human Services (Centrelink) that entitles the person to financial benefits

AND

- Letter from the Department of Human Services (Centrelink) or other Government body in the last 12 months regarding a Government assistance payment
- Tax Office Notice of Assessment issued in the last 12 months
- Rates notice from local council issued in the last 3 months
- Electricity, gas or water bill issued in the last 3 months

Name change

If you have changed your name, you must provide a certified copy of the relevant name change document¹, for example, a marriage certificate, deed poll, decree nisi/divorce order or change of name certificate issued by the Births Deaths and Marriages Registration office.

Signing on behalf of another person

If you are signing on behalf of the applicant you will need to provide the following:

- A **certified** copy of the Guardianship papers or Power of Attorney; and
- A **certified** copy of the appropriate proof of identity for the holder of the Guardianship or Power of Attorney; and
- A **certified** copy of the appropriate proof of identity of the applicant.

¹Translation

If your identification is written in a language other than English, the identification must be accompanied by an English translation prepared by a translator accredited by the National Accreditation Authority for Translators and Interpreters Ltd. (NAATI) at the level of Professional Translator or higher (or an equivalent accreditation), to translate from a language other than English into English.

Your privacy

We collect, use and disclose personal information about you in order to manage your pension benefits and give you information about your super. Our Privacy Policy outlines the type of information we keep about you and how we, and any organisations we appoint to provide services on our behalf, will use this information. If you do not provide the personal information requested, we may not be able to manage your pension. You can read our Privacy Policy online at mercer.com.au/privacy or you can obtain a copy by calling the Helpline.

The policy also includes details about how you may lodge a complaint about the way we have dealt with your information and how we will handle that complaint.

Step 5: Sign the form

By signing this form:

- I have read and understood this form.
- I understand and consent to my information being collected, disclosed and used in the manner set out in this form.

Signature Date / /

Please return your completed form to:

Mercer Super Trust - SmartRetirement Income, GPO Box 4303, Melbourne, VIC 3001.

Step 6: Complete the checklist

To enable your payment to be processed promptly, please ensure you have correctly completed this form before returning it to the fund.

Have you:

- ☐ Provided your member details in **Step 1**?
- ☐ Completed all steps of the form and provided copies of documentation (where required)?
- ☐ Signed and dated the form (**Step 5**)?

Completing Proof of Identity

- ☐ Have you attached the correct identification as outlined in the Completing proof of identity section? Select the identification you have provided:
 - ☐ One Primary identification document; or
 - ☐ Two Alternative identification documents (one from each of the lists specified)
- ☐ Is your identification current? If providing an Australian Passport, one that has expired within the last two years is acceptable.
- ☐ Is your document correctly certified? Ensure the certifier has included ALL of the following on each page:
 - ☐ Written or stamped 'certified true copy'
 - ☐ Signature and printed name
 - ☐ Date – the date MUST be within twelve months of the date we receive your completed form.
 - ☐ Qualification (such as Police Officer, Australia Post employee, etc)

Please refer to the Providing proof of your identity section for more details on how to certify a document and a list of valid certifiers.