

CHANGE OF DETAILS FORM – Individuals

INSTRUCTIONS

Member number

Please use BLOCK LETTERS and BLACK PEN.

SECTION 1 - MEMBER DETAILS

Title Surname DOB

Given name(s)

Unit Street number

Street name

Suburb State

Postcode Gender

SECTION 2 - CHANGE OF NAME

Member

Current name

Previous name

If you have changed your name you will need to provide a certified copy of either a marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office.

SECTION 3 - CHANGE OF CONTACT DETAILS

Old contact details

Phone Mobile

Email

Street

Suburb State Postcode

New contact details

Phone Mobile

Email

Street

Suburb State Postcode

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SECTION 4 - SWITCHING YOUR SUPER OPTIONS

Select your desired super option or spread of options.

Switch fees apply when switching from a super option with a lower contribution fee to a super option with a higher contribution fee. See *Fees and other costs* in the super product guide (PDS) for more information.

Options	Existing account balance	Future contributions
No change	<input type="checkbox"/>	<input type="checkbox"/>
Conservative	<input type="checkbox"/>	<input type="checkbox"/>
Balanced	<input type="checkbox"/>	<input type="checkbox"/>
Growth	<input type="checkbox"/>	<input type="checkbox"/>
Defensive	<input type="checkbox"/>	<input type="checkbox"/>
Climate Advocacy	<input type="checkbox"/>	<input type="checkbox"/>
Smaller Companies	<input type="checkbox"/>	<input type="checkbox"/>
International Shares	<input type="checkbox"/>	<input type="checkbox"/>
Total	1 0 0 %	1 0 0 %

SECTION 5 – NOMINATING OR CHANGING PREFERRED BENEFICIARIES

Update the person(s) who you would prefer to receive your super in the event of your death. This can include your spouse, de factor partner, children, a person with whom you have an interdependency relationship, or a person who is financially dependent upon you. You can also nominate your legal personal representative(s). If you wish to elect otherwise please seek legal advice. The nomination will replace any existing preferred beneficiaries already nominated.

These nominations are **non-binding** and will only be used by **australianethical Super** as a guide.

	Name	Relationship	Percent %
1.	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
2.	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
3.	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Total			1 0 0

If you would like your nominated beneficiaries to be **binding** on **australianethical Super**, then complete the *Binding death benefit nomination form*, which is available on our website.

SECTION 6 - REGULAR VOLUNTARY PERSONAL CONTRIBUTION

Change the frequency and amount of your regular voluntary personal contribution payment.

Amount: \$.

Frequency: **monthly** **quarterly**

SECTION 7 - SIGNATURE(S)

Signature

Date

Previous signature

(if changing name)

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SECTION 8 - ADVISER INFORMATION

If you use a financial adviser, please have them sign and stamp this section. By stamping this application the financial adviser is confirming that they hold a current AFS Licence and are authorised to deal in and/or advise on superannuation products. Some financial advisers may rebate their normal up-front commission to members although they are under no obligation to do so.

Adviser details

Adviser name																												
Address																												
Phone																	Fax											
Dealer group																												
Email																												
@																												

Dealers or advisers stamping and/or signing this document do so on the understanding that **australianethical** has no agency relationship with any broker or adviser and that no broker or adviser acts under **australianethical**'s authority.

Adviser switch commission

Fill in switch commission % to be paid to the adviser. Commission is only payable for a switch if the member is moving to a super option with a higher contribution fee. If this section is incomplete, the full up-front switch commission is payable to the adviser.

From Defensive	To all other options except Climate Advocacy		
	Max.		
From Climate Advocacy	To all other options except Defensive		Defensive
	Max.		Max. 0.5%
	3.075%		

Adviser commission (for future investments)

Fill in commission % to be paid to the adviser:

Up-front and rollover commissions	Conservative		Balanced		Growth		Defensive		Climate Advocacy		Smaller Companies		International Shares						
	Max.	3.6%		Max.	3.6%		Max.	3.6%		Max.	0.5%		NA		Max.	3.6%		Max.	3.6%

Adviser service fee: Maximum 1% pa (exclusive of GST) (annual % of total investment):

Adviser signature

Signature	<input type="text"/>	Date	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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