



# CHANGE OF DETAILS FORM — Pre-retirees and retirees

## 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"/>
2.			<input type="text"/>
3.			<input type="text"/>
Total			<input type="text" value="1"/> <input type="text" value="0"/> <input type="text" value="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 - PENSION PAYMENT

Any change of pension details will take effect from the 15th of the month following receipt of this form.

### Change of bank account details

Provide details of your account into which you would like your pension paid (this must be an account in your name):

Account name

Account number  BSB  Bank

### Change of pension frequency

Select the frequency of your pension (one selection only):

**monthly**     **quarterly**     **six-monthly**     **annually**

### Change of pension amount

Select your pension amount (one selection only):

Amount of \$   **minimum**     **maximum**

## 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"/>	<input type="text"/>	<input type="text"/>
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