


# Pension Payment Election Form

For Pension members previously with Christian Super

 Use this form if you were previously a Christian Super member.

You only need to lodge this form if you wish to change your current payment amount. Your elected pension payment amount must fall at or between the minimum and maximum (if applicable) amount allowed under government legislation.

**Send the form together with any other associated documentation to:**  
 Australian Ethical Super Locked Bag 5073  
 Parramatta NSW 2124  
 or email: [members@australianethical.com.au](mailto:members@australianethical.com.au)

We recommend you read the PDS and AIB (Pension) at [australianethical.com.au/super/pds](http://australianethical.com.au/super/pds) and consider speaking with a financial adviser before making any investment decisions.

## Step 1: Your details

Member number (this can be found on your Member Statement)











Date of birth









Mr/Mrs/Ms/Rev/Other





Surname






















Given Names






















## Step 2: Changing your pension payment amount

I wish to change my pension payment to:

- Minimum Amount
- Maximum Amount (Note: this option is only applicable for members with a transition to retirement account)
- Specific amount \$  per payment

## Step 3: Pension payment frequency

- Twice monthly *Paid on the 15th and 28th day of each month*
- Monthly *Paid on the 15th day of each month*
- Quarterly
- Twice yearly
- Yearly

Month of first payment:











Please note that a yearly payment is not available in July.

## Step 4: Pension payment drawdown

You can nominate 3 different ways in which to draw your pension payments:

### Option A - Proportionately from my investments (pro rata).

Choose this option if you would like your pension payments to be drawn proportionately from the investment options you are invested in.

### Option B - Percentage split according to the nominated investment choice below.

If your selection is unclear or does not add up to 100%, you will be contacted in writing to confirm your selection.

#### Percentage split

Options	Percentage*
Defensive	<input type="text"/> %
Conservative	<input type="text"/> %
Balanced (pension)**	<input type="text"/> %
Balanced (accumulation)***	<input type="text"/> %
Growth	<input type="text"/> %
International Shares	<input type="text"/> %
Australian Shares	<input type="text"/> %
<b>TOTAL</b>	<b>100%</b>

\* Please ensure that your investment selections total 100% and that each option is in whole percentages

\*\* Available for account-based Pensions only

\*\*\* Available for Transition to Retirement (TTR) accounts only

Once there is no longer enough money in your chosen options, your payments will be paid proportionately from your investments.

**Option C** - If you nominate a drawdown order, we will deduct payments from the first option until your investment in that option is exhausted, and then deduct payments from the second option and so on.

#### Sequential drawdown

Options	Drawdown order <sup>^</sup>
Defensive	<input type="text"/>
Conservative	<input type="text"/>
Balanced (pension)**	<input type="text"/>
Balanced (accumulation)***	<input type="text"/>
Growth	<input type="text"/>
International Shares	<input type="text"/>
Australian Shares	<input type="text"/>

<sup>^</sup>Please number your drawdown from 1 to 7.

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\*\*\* Available for Transition to Retirement (TTR) accounts only

## Step 5: Pension payment bank details

Please ensure this form is completed and returned at least 14 days prior to your next payment, otherwise the changes may take effect from the following payment.

### Bank account details

Provide details of the account into which you would like your pension paid. The account must be in your name and can be a joint account. **You must also provide a copy of a bank statement showing your full name, BSB and account number. This statement needs to be issued within the last 2 years.**

Name of financial institution

Branch

BSB number

Account number

Account holder name

Account holder 2 name (if joint account)

I have attached a copy of a recent bank statement showing my name, account number and BSB.

## Step 6: Signature & Declaration

- The details that I have provided are true and correct.
  - I am aware that I may ask my superannuation provider for information about any fees or charges that may apply, or any other information and do not require any further information.
  - I have received, read, and agree to the terms outlined in the **Australian Ethical Super Product Disclosure Statement (PDS)** available at **australianethical.com.au/super/pds**.
  - I have received, read, and agree to be bound by the **Privacy Collection Notice (Super) and the Privacy Policy** available at **australianethical.com.au/privacy-policy**.
  - I authorise Australian Ethical Super to give effect to the changes outlined in this document.
- ❗ Please note we currently do not accept electronic signatures on forms. To avoid delays or having to complete this form again, ensure you sign the documents with a wet ink signature (i.e. by hand with a black or blue ink pen).

Signature

Signatory's full name (please print)

Date (DD/MM/YYYY)

❓ If you have any questions, please contact Australian Ethical Super on 1800 021 227.