



# PensionSelect notification of change of details

You may lodge this form by posting to:

AIA Australia  
Locked Bag 5075  
Parramatta NSW 2124

**Please note: Changes will be made effective the date your completed documentation is received at our principal office of administration.**

## Section A – Personal (to be completed in all cases together with Section H)

Account number

(If changing your name and/or address, please write your name and/or address last notified to AIA Australia.)

Title  Mr  Mrs  Miss  Ms  Other

Given name(s)  Surname

Postal address   
 State  Postcode

Daytime phone number  Evening phone number  Mobile number

Email address

## Section B – Change of name\*

New name\*  
Title  Mr  Mrs  Miss  Ms  Other

Given name(s)  Surname

Old signature  New signature

\* Please attach evidence i.e. certified copy of Deed Poll, Marriage Certificate, etc.

## Section C – Change of address and contact details

New postal address   
 State  Postcode

New street address   
 State  Postcode

Daytime phone number  Evening phone number  Mobile number

Email address

## Section D – Nomination of beneficiary (non-binding)

Do not complete this section if you have a reversionary beneficiary (binding) in place. This information is available on your Annual Statement or simply call **13 2015**, between 8.30am and 6pm (AEST/AEDT), Monday to Friday.

Please (✓) tick the appropriate box, complete details and sign in Section H.

- I wish to nominate a beneficiary on my account (please read the section 'Important information about beneficiary nominations' and then complete 'Indicate how you would like your benefit to be paid' below) **and/or**
- I wish to revoke any previous beneficiary nomination made in respect of my account

### Important information about beneficiary nominations

The Trustee has absolute discretion when distributing death benefits but will take your nomination into account. You may nominate anyone who is a 'dependant' as defined in the Trust Deed and/or your estate (i.e. your legal personal representative).

If the person whose name is specified below differs from a previous appointment made by you, the previous appointment(s) will be automatically revoked.

#### Who is a dependant?

Under the Fund Trust Deed, a dependant includes:

- a spouse, including a person (whether of the same or a different sex) with whom you are living on a genuine domestic basis in a relationship as a couple and a person with whom you are in a relationship registered under State or Territory law
- a child of any age (including an adopted child, step child or an ex-nuptial child, a child of your spouse and your child within the meaning of the Family Law Act 1975)
- a person with whom you have an interdependency relationship
- a person financially dependent on you.

Under superannuation law, an 'interdependency relationship' will exist where two people (whether or not related by family) meet all of the following conditions:

- they have a close personal relationship
- they live together
- one or each of them provides the other with financial support, and
- one or each of them provides the other with domestic support and personal care.

There may also be an interdependency relationship where two people have a close personal relationship and either or both of them suffer from a physical, intellectual or psychiatric disability. In this circumstance, there is no requirement for cohabitation or for provision of financial or domestic support.

#### Indicate how you would like your benefit to be paid

- Lump sum nomination

Full name	Relationship to you (spouse, child, interdependant, financial dependant)	Date of birth	Share of benefit
		/ /	%
		/ /	%
		/ /	%
		/ /	%
<b>My Estate (i.e. legal personal representative)</b>			<b>%</b>
			<b>100%</b>

- Pension nomination (a pension cannot be paid to your Legal Personal Representative)

Full name	Relationship to you (spouse, child, interdependant, financial dependant)	Date of birth	Share of benefit
		/ /	<b>100%</b>

Although children generally qualify as dependants, a child aged 18 or over can only receive a pension if the child is financially dependent on you at your death and under age 25, or suffers from certain types of disability. Where a child aged 18 or over receives a pension, unless the child suffers from a relevant disability, the pension must be cashed as a lump sum when the child turns 25.

**Please note:** Upon notification of your death, we will move your whole account balance to the Savings investment option. Your benefit will remain in this investment option until such time as the Trustee makes a decision as to who will receive your benefits.

## Section E – Gross pension amount per annum/indexation rate

Please alter my pension payment as follows. Please (✓) tick the appropriate box.

Minimum pension

or

Specified amount ▶ per annum \$  or per payment \$

Optional Annual Indexation Rate  
(0–5%) whole numbers only

▶  (max 5%)

**Please note:** pension payment being received must be above the legislated minimum levels.

## Section F – Payment frequency

Please alter the frequency of my pension payments to:

(If a change prevents payment of minimum annual income an additional ‘Special’ payment may be required)

Fortnightly ▶ Please nominate day of payment M T W T F

Monthly

Quarterly

Half yearly

Yearly

## Section G – Payment instructions

Please credit my account

Name of account

BSB

Account identification number

Bank

Branch

## Section H – Declaration and acknowledgement

- I declare that the information provided on this form is correct;
- I request that your records be updated to reflect the changes indicated.

Member's signature

Date