Change of member details

☐ Select Personal Superannuation

☐ Select Allocated Pension

Please write in **BLOCK** letters and use a ballpoint pen to complete this form.

Section 1 – New personal details

Membership number

Title ☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Date of birth / /

Surname

Given name(s)

Mailing address

State Postcode Country

Home telephone ( )

Business telephone ( )

Mobile

Email address

Occupation (if applicable)

Salary (if applicable) $

Section 2 – Nomination of dependants(s)

This nomination is subject to the Trustee's discretion and is not binding on the Trustee.

You can nominate one or more dependants or your legal personal representative (i.e. your estate) for consideration by the Trustee to receive your benefits in the event of your death.

A nomination of a dependant is only valid if the person is a dependant at the time of your death. Your dependant is:

- a spouse, which includes someone (whether of the same or different sex) with whom you are in a relationship registered under State or Territory law, and also another person with whom you live as a de facto couple;
- a child, which includes adopted, step or ex-nuptial children, a child of your spouse, and also someone who is your child within the meaning of the Family Law Act 1975;
- any person with whom you have an interdependency relationship;
- any other person financially dependent on you.

Full name	**Relationship to you**	**Date of birth**	**Share of benefit**
		/ /	%
		/ /	%
		/ /	%
		/ /	%
		My estate (i.e. legal personal representative)	%
		Total Amount	100%

Section 3 – New investment strategy

A maximum of 20 investment options may be selected in total (10 for your Account Balance Strategy and 10 for your Future Investment Strategy). Please specify (by completing the tables below) how you would like your existing account balance and any future investments applied at the effective date of your switch. Your Account Balance Strategy may be different to your Future Investment Strategy. All future investments will be pro-rated and applied to your Future Investment Strategy and fees/taxes pro-rated and deducted from your Account Balance Strategy and your Future Investment Strategy. Please refer to your Product Disclosure Statement (PDS) for details on available investment options.

If no Future Investment Strategy is provided all future transactions will be based on the Account Balance Strategy.

Please complete the table below.

- **Change Account Balance Strategy:** Alters investment strategy for all assets currently held in your Account.
- **Change Future Investment Strategy:** Alters investment strategy for all future assets received and transactions in your Account.

	Select Allocated Pension Investment option code	Select Personal Superannuation Investment option code	Change Account Balance Strategy	Change Future Investment Strategy
Aggressive strategy				
International shares				
Multi-Manager Global Share	EXCMOE	SXCMOE	%	%
Stewart Investors Worldwide Leaders	EXFSOE	SXFSOE	%	%
First Sentier Index Global Share	EXCTOE	SXCTOE	%	%
RBC Emerging Markets	EXSAOE	SXSAOE	%	%
Australian shares				
Multi-Manager Australian Share	EXCMDE	SXCMDE	%	%
Alphinity Concentrated Australian Share	EXCSDE	SXCSDE	%	%
Solaris Core Australian Share	EXCPAS	SXCPAS	%	%
First Sentier Australian Share	EXFSAS	SXFSDE	%	%
First Sentier Index Australian Share	EXCTDE	SXCTDE	%	%
First Sentier Australian Small Companies	EXCPSC	SXCPSC	%	%
Realindex Australian Share	EXPPIS	SXPPIS	%	%
Property				
Global Property Securities	EXCMPS	SXCMPS	%	%
Diversified				
High Growth	EXFIGR	SXFIGR	%	%
Growth strategy				
Diversified				
Growth	EXCSGR	SXCSGR	%	%
Moderate strategy				
Diversified				
Balanced	EXCMMO	SXCMMO	%	%
Conservative strategy				
Diversified				
Capital Stable	EXFSCS	SXFSCS	%	%
Defensive Strategy				
Fixed interest				
Macquarie Australian Fixed Interest	EXACFI	SXACFI	%	%
Multi-Manager Fixed Income	EXCMFI	SXCMFI	%	%
Cash				
Cash	EPACAS	SPACAS	%	%
		TOTAL	**100%**	**100%**

Section 4 – Insurance details

Section 4 is to be completed by members of Select Personal Superannuation only

Insurance Cover

I would like the following decrease/increase in cover. Please advise new cover or sum assured amount.

☐ Death cover $

☐ TPD cover $

☐ Income Protection cover $

Please note TPD cover cannot exceed Death cover.

Note: A Personal Statement Summary must be completed if you are increasing insurance cover. This form will be sent to you if required.

Changes to insurance will not apply until AIA Australia gives written acceptance of the new level of cover on standard terms or you accept the non-standard terms offered by AIA Australia.

Section 5 – New pension payment details

Sections 5 & 6 are to be completed by members of Select Allocated Pension only

Frequency

☐ Monthly ☐ Quarterly ☐ Half-yearly ☐ Yearly

Date that the new pension payments will commence

Month Year

Annual rate of pension (please tick (✔) one box)

☐ Minimum payment **or** ☐ Selected annual amount of $

Indexation option

☐ No increase ☐ % p.a. % (insert %) ☐ CPI linked

- If you have elected to receive the minimum allowable pension amount, you cannot nominate to have your pension payments indexed.
- If you nominate a pension amount, this will apply from the next pension payment. The annual pension amount therefore must meet the minimums prescribed by the government for the current financial year.
- If you nominate an annual amount and pension payment(s) have been made, your remaining pension payment(s) will be recalculated to achieve this amount.

Section 6 – New bank account details (for direct bank remittance of pension)

Name of account

Bank

Branch

BSB (Branch number)

Account number

Section 7 – Investor's declaration

- I believe that I have obtained sufficient information to explain the investment objectives, the risk and effect of each investment option; and
- I declare that if this Change of member details form is signed under a Power of Attorney, the Attorney declares that they have not received notice of revocation of that power (a certified copy of the Power of Attorney should be submitted with the Change of member details form).

Member signature

✗

Date

/ /

If you have any queries or need assistance to complete this form, please contact your financial adviser or call one of our Customer Service Representatives on 1800 552 660 between 8.30am and 6.00pm (AEST/AEDT), Monday to Friday, excluding public holidays.

Mail this completed form to:

AIA Australia Select Personal Superannuation OR

AIA Australia Select Allocated Pension

Locked Bag 5075
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NSW 2124