



Commonwealth PensionSelect Notification of change of details



This form may be lodged with any Commonwealth Financial Planner or posted to:

Commonwealth Financial Services
GPO Box 3306
SYDNEY NSW 2001.

Alternatively, you can fax this form to 1800 002 715.

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 Commonwealth Financial Services.)

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. We cannot accept a fax for your name change.**

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 (Sydney time), 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

Indicate how you would like your benefit to be paid

Lump sum beneficiary – I request my beneficiary as named below to be paid a lump sum on my death. You can nominate more than one lump sum beneficiary by attaching a signed notice with all beneficiary details and the whole percentage amount applicable to each

Legal Personal Representative (your estate)

Important information about beneficiary nominations

Who is a dependant?

A dependant includes

- A spouse*;
- A child (includes an adopted child, stepchild, ex-nuptial child, a child of your spouse and someone who is your child within the meaning of the Family Law Act 1975);
- Any person who is financially dependent on you;
- Any person with whom you have an interdependency relationship.

What is an interdependency relationship?

Two people are said to have an interdependency relationship if:

- They have a close personal relationship; and
- Live together; and
- 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.

Two people who have a close personal relationship but who cannot satisfy all of the other requirements of an interdependency relationship because of a physical, intellectual or psychiatric disability, still have an interdependency relationship.

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

Full name of beneficiary

Date of birth

Address

<input type="text"/>	
State	Postcode

Relationship (please tick ✓ one)

Spouse Child Financial dependent Interdependent

Please note: Your nomination will be used as a guide by the Trustee as to whom your benefit should be paid, but it is not binding on the Trustee. The Trustee has absolute discretion in determining to whom your benefits will be paid on your death. Upon notification of your death, we will move your whole account balance to the Commonwealth 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.

* This includes (a) another person (whether of the same sex or different sex) with whom you are in a relationship that is registered under a law of a State or Territory prescribed for the purposes of Section 22B of the Acts Interpretation Act 1901 as a kind of relationship prescribed for the purposes of that section; and (b) another person who although not legally married to you lives with you on a genuine domestic basis in a relationship as a couple.

Section E – Gross pension amount per annum/indexation rate

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

Minimum pension (ordinary)

or

Minimum pension (5% reduction of ordinary amount)*

* **Please note:** that where you have already received in excess of the 5% reduced minimum, the minimum in your case will be the amount you have actually received. No refund will be allowed.

or

Specified amount (p.a.) ▶ \$

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

▶ (max 5%)

Please note: the specified amount (after indexation) must be above your specified minimum.

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

Bank use only

Please make sure this notification is fully completed, dated below and send it today to **2380 001, Commonwealth Financial Services HOMEBUSH NSW** in the special Z991 envelope, or fax it to 1800 002 715. (Please do not both fax and send this form)

Date received

Investment consultancy/branch

Adviser ID/contact name

Adviser phone number