



i Use this form to update your name, contact details, Tax File Number (TFN) or bank account details with us. Note that we will only change your details on your Essential Super account if you have bank accounts or other products with the Commonwealth Bank, you will need to separately notify the Bank of your change of details. Please complete this form using **BLACK INK** and print well within the boxes in **CAPITAL LETTERS**. Start at the left of each answer space and leave a gap between words.

1 Member details

Account number – You can find your Essential Super account number in the CommBank App or NetBank.

067979

If you do not know your account number, please fill in your details below.

Title Mr Mrs Miss Ms Other

Full given name(s)

Surname

Date of birth

Tax File Number – You are not obliged to disclose your TFN, however there are benefits, please refer to page 3.

2 Use this section to update contact details

New residential address (PO Box is NOT acceptable)

Unit number Street number Street name

Suburb State Postcode

Country

New postal address

Unit number Street number Street name

Suburb State Postcode

Country

Work phone number Work phone number Mobile phone number

Email address

New email address

3 Use this section to change your bank account details

Please note: Bank account provided must be personal (not business) and held in your name or jointly held. If you intend on making a withdrawal in the future, it may prevent a delay in processing unless you provide a certified copy of your passport or driver's licence to meet Anti-Money Laundering obligations.

Name of Australian financial institution

Branch name or address

Branch number (BSB) Account number

Account holder name

4 Use this section to update or change your account name

Please note: If you are filling out this section you will also need to attach a certified copy of the documentation by which you registered your change of name, such as a Marriage Certificate, Deed Poll or Decree nisi (in case of a divorce). Please also provide a copy of passport or driver's licence in your new name for Anti-Money Laundering requirements.

Title Mr Mrs Miss Ms Other

Given name(s)

Surname

Date of birth

Old signature

Print name

Date signed

New signature

Print name

Date signed

5 Declaration

I declare that:

- all details in this form are true and correct
- if this form is signed under 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 this form unless we have already sighted it)
- I release and indemnify the trustee and/or its related entities ('the Group') against any liabilities whatsoever arising out of Colonial First State acting on any communications received by phone, fax, or other electronic means including without limitation transactions effected through the internet in respect of my investments.

Do you have a bank account with the Commonwealth Bank?

If you are a customer of the Commonwealth Bank of Australia (Bank) or Colonial First State Investments Limited (who is the Trustee for Essential Super) (Trustee), either the Bank or the Trustee may have collected your personal information, including your personal identification information to carry out know your customer checks.

You can authorise each of the Bank and Trustee to act on your behalf to share your information between them, including your identity details. This will help each of the Bank and the Trustee to provide their services to you, and will also help to streamline the processing of your request.

Do you authorise the Bank and Trustee to share your personal information between each other to help complete their know your customer checks (which will need to be completed as part of processing your request)?

- I appoint each of the Bank and the Trustee as my agent to share with each other my personal information, including identification information, to help them process my request (which includes to help ensure that they can complete their know your customer checks on me).

Signature of member

Date signed

Print name

Bank use Only

This form should not be accepted or processed at branch. Please mail to:

Essential Super, Reply Paid 86495, Sydney NSW 2001 or contact 13 40 74 or Upload a scanned copy on NetBank.

How do I have my identification certified?

Firstly, make a copy of the original document (e.g a valid Driver's licence or passport). Take the document and the copy to an authorised person (e.g Justice of the Peace or a Police officer).

To be correctly certified, the copy of the document needs to have an authorised person place an original signature on each page of the document to certify it is a true copy of the original. A full list of authorised persons is available below.

All certified copies of documents must have, (written in English) on every page:

- The words "A true copy of the original document"
- The authorised signatory's name
- The authorised signatory's job (such as Police Officer)
- The authorised signatory's signature
- The date the copy of the document was certified

You can either mail the forms to us or alternatively you can log into Netbank and send us scanned copies. Select your Essential Super account in NetBank and then select > Transactions > My account > e-Post a request or upload scanned form.

If you have any questions, please speak to one of our Essential Super team on 13 4074, Monday to Friday between 8am and 7pm Australian Eastern Standard Time.

About Your Tax File Number (TFN)

Why can we ask for it? Under super law (Superannuation Industry (Supervision) Act 1993), we can collect, use and disclose your TFN.

How will we use it? If you give us your TFN, you are giving us consent to use it for legal purposes. This includes disclosing your TFN to another super fund, when your benefits are being transferred, unless you request us in writing not to disclose your TFN to any other super provider; and where applicable and unless you opt out, searching for your other super accounts (see below). If you provide your TFN, it will be treated confidentially. You should provide us with your TFN when you join Essential Super. If you don't provide us with your TFN, we are required under law to only accept certain types of contributions and additional tax may apply.

What are the advantages of providing it? You don't have to give us your TFN – it's not required by law. But giving us your TFN has the following advantages:

- we will be able to accept all permitted types of contributions to your account(s);
- other than the tax that may ordinarily apply, you will not pay more tax than you need to - this affects both contributions to your super and benefit payments when you start drawing down your super benefits;
- and it will make it much easier to find different super accounts in your name so that you receive all your super benefits when you retire.
- **Please note:** The legal purposes may change in the future following legislative change, and the advantages of providing your TFN may also change.

How do we use your TFN to search for your other super accounts?

With your consent, when we search for your other super accounts, you are consenting to us acting on your behalf and using your TFN to search the ATO's SuperMatch program for super amounts held on your behalf by the ATO or by other super funds (and seeking more information from those funds about the accounts found). This consent will be held into the future and will allow us to complete periodic searches. If at any time you wish to withdraw your consent, please contact us on 13 4074. We will let you know the results of all searches. Then, you can decide if you would like us to consolidate your super accounts with us. If you need advice on super consolidation, please talk to a financial adviser.

Identification and Verification – Certification of Documents

Below is a comprehensive list of prescribed persons who are authorised to certify copies of identification documents for the purposes of Anti-Money Laundering and Counter-Terrorism Financing laws.

Australian-based authorised signatories

One of the following persons:

- A person who, under a law in force in a State or Territory, is currently licensed or registered to practise in one of the following occupations:
 - Chiropractor
 - Dentist
 - Legal practitioner
 - Medical practitioner
 - Nurse
 - Optometrist
 - Patent attorney
 - Pharmacist
 - Physiotherapist
 - Psychologist
 - Trademarks attorney
 - Veterinary surgeon
- A person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner (however described)
- An officer with, or authorised representative of, a holder of an Australian financial services licence (AFSL), having 2 or more years of continuous service with one or more licensees
- An officer with, or a credit representative of, a holder of an Australian credit licence (ACL), having 2 or more years of continuous service with one or more licensees
- Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- Australian Consular Officer, within the meaning of the Consular Fees Act 1955. This includes a person appointed to hold or act in any of the following offices of the Commonwealth (of Australia) in a country or place outside Australia:
 - Consul-General
 - Consul
 - Vice-Consul
 - Trade Representative
 - Consular Agent
- Australian Diplomatic Officer, within the meaning of the Consular Fees Act 1955. This includes a person appointed to hold or act in any of the following offices of the Commonwealth (of Australia) in a country or place outside Australia:
 - Ambassador
 - High Commissioner
 - Minister
 - Head of a Mission
 - Commissioner
 - Charge d'Affaires
 - Counsellor, Secretary or Attache at an Embassy, High Commissioner's office, Legation or similar
- Bailiff
- Bank officer with 2 or more continuous years of service
- Building society officer with 2 or more years of continuous service
- Chief executive officer of a Commonwealth court
- Clerk of a court
- Commissioner for Affidavits
- Commissioner for Declarations
- Credit union officer with 2 or more years of continuous service

- Employee of the Australian Trade and Investments Commission who is:
 - in a country or place outside Australia; and
 - authorised under paragraph 3 (d) of the Consular Fees Act 1955; and
 - exercising his or her function in that place
- Employee of the Commonwealth who is:
 - in a country or place outside Australia; and
 - authorised under paragraph 3 (c) of the Consular Fees Act 1955; and
 - exercising his or her function in that place
- Fellow of the National Tax Accountants' Association
- Finance company officer with 2 or more years of continuous service
- Holder of a statutory office not specified in another item on this list
- Judge of a court
- Justice of the Peace
- Magistrate
- Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961
- Master of a court
- Member of Chartered Secretaries Australia
- Member of Engineers Australia, other than at the grade of student
- Member of the Association of Taxation and Management Accountants
- Member of the Australian Defence Force who is:
 - an officer; or
 - a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with 2 or more years of continuous service; or
 - a warrant officer within the meaning of the Defence Force Discipline Act 1982
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the Institute of Public Accountants
- Member of:
 - the Parliament of the Commonwealth; or
 - the Parliament of a State; or
 - a Territory legislature; or
 - a local government authority of a State or Territory.
- Minister of religion registered under Subdivision A of Division 1 of Part IV of the Marriage Act 1961
- Notary public
- Permanent employee of the Australian Postal Corporation with 2 or more years of continuous service who is employed in an office supplying postal services to the public
- Permanent employee of:
 - the Commonwealth or a Commonwealth authority; or
 - a State or Territory or a State or Territory authority; or
 - a local government authority;
 - with 2 or more years of continuous service and the person is not already specified in another item on this list
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- Police officer
- Registrar, or Deputy Registrar, of a court
- Senior Executive Service employee of:
 - the Commonwealth or a Commonwealth authority; or
 - a State or Territory or a State or Territory authority
- Sheriff
- Sheriff's officer
- Teacher employed on a full-time basis at a school or tertiary education institution
- Member of the Australasian Institute of Mining and Metallurgy

List of persons authorised to certify true copies of original documents for customers outside Australia.

- A legal practitioner who holds a current practicing certificate under a law in force in a State or Territory in Australia
- Commonwealth Bank of Australia officers at offshore branches with 2 or more years continuous service with Commonwealth Bank of Australia
- Officers of any other Australian bank or other Australian financial institution that holds either an AFSL or ACL (being either a bank, building society or credit union) or Australian finance company with offices outside Australia where the officer has 2 or more years' service with the relevant Australian financial institution or the relevant Australian finance company
- A judge, magistrate, registrar or deputy registrar of an overseas court
- An Australian consular or diplomatic officer who holds one of the following positions:
 - Consul-General
 - Consul
 - Vice-Consul
 - Trade Representative
 - Consular Agent
 - Ambassador
 - High Commissioner
 - Minister
 - Head of a Mission
 - Commissioner
 - Charge d'Affaires
 - Counsellor, Secretary or Attache at an Embassy, High Commissioner's office, Legation or similar.
- A member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the Institute of Public Accountants with 2 or more years of continuous membership.
- A person authorised as a notary public in a foreign country
- Employee of the Australian Trade and Investment Commission who is:
 - in a country or place outside Australia; and
 - authorised under paragraph 3 (d) of the Consular Fees Act 1955; and
 - exercising his or her function in that place
- Employee of the Commonwealth who is:
 - in a country or place outside Australia; and
 - authorised under paragraph 3 (c) of the Consular Fees Act 1955; and
 - exercising his or her function in that place.