

# Pension membership application

Before you complete this application form, you should read the legalsuper Pension Product Disclosure Statement (PDS), which includes important information about legalsuper pensions. Please use **BLOCK letters and black ink** when completing this form and ensure all relevant fields are completed and signed. Attach any associated documentation before returning it legalsuper.

Return this completed form to:  
 legalsuper pension  
 Locked Bag 5042  
 Parramatta NSW 2124  
 Phone: 1800 623 502  
 Fax: 1300 663 844  
 Email: mail@legalsuper.com.au

## 1. Pension option

- Pension**  
 You have retired from the workforce permanently or are over age 65.
- Transition to Retirement pension**  
 You are still working and have reached your super preservation age but are under 65 years of age.

## 2. Personal details

Mr  Mrs  Ms  Miss  Dr  Justice

Surname

Given Names

Date of birth (dd/mm/yyyy)

Postal Address

Town or Suburb

State  Postcode

Tax File Number

Telephone Number

Mobile Number

Email

## Collection of tax file numbers (TFN)

Under the Superannuation Industry (Supervision) Act 1993, your superannuation fund is authorised to collect your tax file number (TFN), which will only be used for lawful purposes.

For further information about how legalsuper will manage your TFN, refer to the legalsuper Pension PDS, which is available from the legalsuper website at **legalsuper.com.au** or by calling **1800 623 502**.

**If you are under 60 years of age, you are required to complete a tax file declaration form.**

## 3. Investment amount

I wish to transfer the following amounts to commence my pension:

- A. The following amount from my legalsuper superannuation account:  
 Membership number:   
 the full balance of the account, closing it to future contributions, as I have ceased work.  
 the maximum allowable amount, leaving a minimum of \$1,000 to keep the account open.  
 the nominated sum of \$
- B. Monies from other superannuation funds:  
 Complete a separate request to transfer form for each transfer. The form is enclosed with this application. Your pension will not commence until all your rollovers have been received.
- C. Additional superannuation monies to consolidate my existing legalsuper pension account.  
 Pension membership number:   
 If you choose this option, you must also complete Option A above.  
 When you include your pension membership number, we will close your existing pension account and we will need to pay you the minimum benefit. Once your pension account is closed, it cannot be reinstated.

continued overleaf

#### 4. Investment choice

You can invest in one investment option or any mix of investment options. The percentage for each option must be a whole number and the total must add to 100% or this nomination will be invalid. Please refer to 'Your investment choices' in the Pension PDS. The Pension PDS is available from the legalsuper website at [legalsuper.com.au](http://legalsuper.com.au) or by calling **1800 623 502**.

Please invest my pension amount as follows:

Investment Choice Option	% for each Investment Choice
Cash	<input type="text"/> %
Enhanced Cash	<input type="text"/> %
Conservative	<input type="text"/> %
Balanced	<input type="text"/> %
Growth - Fund default option*	<input type="text"/> %
Assertive	<input type="text"/> %
Aggressive	<input type="text"/> %
Australian Shares	<input type="text"/> %
Overseas Shares	<input type="text"/> %
Socially Responsible Investment (SRI)	<input type="text"/> %
Total (must be 100%)	<b>100 %</b>

\* The Growth option is legalsuper's default option. If you do not make an investment choice above, your account will be invested in the default option until you advise us otherwise.

**I understand (and my signature following is evidence of this understanding) that:**

- The investment performance of legalsuper's investment choice options is not guaranteed.
- If I do not select an investment choice option upon joining legalsuper, my super will be invested in the Growth option, which is the Fund's default option.
- My investment choice can be changed on any working day, and becomes effective on the following working day after legalsuper receives this correctly completed form.
- legalsuper will confirm my investment choice in writing.

I acknowledge that I should seek independent professional financial advice if I need assistance in making a choice.

#### 5. Payment details

**If you do not choose how frequently you would like your pension paid, legalsuper will automatically pay you each year in June.**

I want to receive my income payments:

- Twice-monthly\*
- Monthly\*
- Quarterly (September/December/March/June)
- Half-yearly - in the months of  and
- Yearly - in the month of

Nominated date of first payment (dd/mm/yyyy)\*

\* **Note:** payments are processed on the 28th of each month (in arrears). Twice-monthly payments are processed on the 14th and 28th of each month (in arrears).

#### Regular income payment

(Please tick one box only)

- The **minimum amount** per annum required under legislative guidelines
- The **maximum amount** per annum allowed under legislative guidelines\*
- A **nominated amount** (subject to min/max guidelines):
- \$

\* There is no maximum amount unless you are applying for a Transition to Retirement pension.

Maximum payments will be paid pro-rata during the first pension year unless indicated otherwise overleaf.

#### Pro-rata payments

- Yes, pay pro-rata payments (Default option)
- No, do not pay pro-rata payments

I want legalsuper to pay my pension amount in the following proportions from the listed choices.

Investment Choice Option	% for each Investment Choice
Cash	<input type="text"/> %
Enhanced Cash	<input type="text"/> %
Conservative	<input type="text"/> %
Balanced	<input type="text"/> %
Growth - Fund default option*	<input type="text"/> %
Assertive	<input type="text"/> %
Aggressive	<input type="text"/> %
Australian Shares	<input type="text"/> %
Overseas Shares	<input type="text"/> %
Socially Responsible Investment (SRI)	<input type="text"/> %
Total (must be 100%)	<b>100 %</b>

I understand that if I do not select any investment options here, my pension will be paid to me in the same proportions as my nominated investment choices in Section 4.

#### Payment instructions

Credit the following bank/building society/credit union (via electronic funds transfer where applicable).

Bank name/financial institution

Address of bank (suburb or town)

Account holder's name



BSB number

Account number

continued overleaf

### 6. Nomination of beneficiaries

Please nominate the type of beneficiary option you wish to be implemented in the event of your death. (Please select one option.)

**Option 1 - As a reversionary pension to be paid to your nominated dependant\***

Mr    Mrs    Ms    Miss    Dr    Justice  
 Surname   
 Given Names   
 Date of birth (dd/mm/yyyy)   
 Relationship

\* There are restrictions on who may receive your pension as a reversionary beneficiary (refer to the Pension PDS).

**Option 2 - Lump sum to be paid to your nominated beneficiaries**

Please provide names of your preferred beneficiary/ies in the event of your death. You can photocopy this page of the form if you have more than two beneficiary nominations. (Benefit allocations must add up to 100%.)

1. Full Name   
 Relationship      Benefit allocation %  %

2. Full Name   
 Relationship      Benefit allocation %  %

3. Full Name   
 Relationship      Benefit allocation %  %

4. Full Name   
 Relationship      Benefit allocation %  %

**Option 3 - Lump sum to be paid to your estate**

**Do you wish to make a Binding nomination?**

- No - my nomination is to be Non-binding **(go to Section 8)**
- Yes - my nomination is to be Binding **(go to Section 7)**

continued overleaf

## 7. Signatures (Binding nominations only)

The following signatures confirm my Binding nomination(s) (my signature plus those of 2 witnesses over the age of 18 who are not included in the preceding nomination(s) in Section 6) and that I have read and understood the information in this form and the legalsuper Pension PDS regarding Binding Death benefit nominations.

I understand that:

- Each beneficiary must be either a dependant as defined in Section 6 or my legal personal representative at the time of my death.
- My beneficiary(ies) and I will be bound by the provisions of the legalsuper trust deed relating to Binding Death benefit nominations.
- This Binding nomination is only valid for three years from the date I sign it or any confirmation or amendment of it. I accept that should my circumstances change, or those of any of my beneficiaries, it is my responsibility to review my nomination and change it if required.
- I may at any time revoke or change a Binding nomination in accordance with the Fund's procedures.
- If this nomination is invalid or has not been sent to the Trustee when I die, the Death benefit will be paid by the Trustee in its discretion to or for the benefit of one or more of my dependants or my legal personal representative(s) in such proportions between them as the Trustee determines.
- This nomination applies to all my superannuation in legalsuper.
- I agree and understand that my pension superannuation arrangements will be governed by prevailing legislation and the terms and provisions of legalsuper's governing rules as in force from time to time.
- I have read the above information setting out the terms upon which this nomination is made.

Member's signature

Date (dd/mm/yyyy)

### Two witnesses are required for a Binding nomination (see notes above).

In witnessing this nomination, I declare that the member signed the nomination above in my presence, I am at least 18 years of age and I am not a beneficiary nor the legal personal representative of the member above.

#### Witness 1

Surname

Given names

  


Signature

Date of birth (dd/mm/yyyy)

#### Witness 2

Surname

Given names

  


Signature

Date of birth (dd/mm/yyyy)

## 8. Declaration

The personal information that you have provided on this form will be used by legalsuper to establish your account in accordance with your instructions. If you do not provide the information, the Trustee will not be able to establish an account as you have requested.

Information about how legalsuper uses and discloses the personal information that you provide is contained in the Fund's *Policy for management of personal information*. To access the Fund's policy and your personal details or to make an enquiry about any aspect of your Fund membership, please call legalsuper pension on **1800 623 502**, visit legalsuper's website at **legalsuper.com.au** or write to legalsuper pension at Locked Bag 5042, Parramatta NSW 2124.

I have read and understood the legalsuper Pension PDS.

I declare that the information in this form is true, and acknowledge responsibility for its completeness and accuracy.

I declare and agree that I am not a temporary resident\*.

I agree and understand that my pension superannuation arrangements will be governed by prevailing legislation and the terms and provisions of legalsuper's governing rules as in force from time to time.

Member's signature

Date (dd/mm/yyyy)

\* A temporary resident is a holder of a temporary visa under the *Migration Act 1958*, other than a retirement visa holder (subclass 405 or 410), and is not an Australian citizen, a New Zealand citizen or a permanent resident.