



3. Tax file number (TFN)

We are authorised to collect your tax file number (TFN) under Superannuation Law. It is not an offence not to quote your TFN, but if you do not supply us with your TFN we will be required to deduct additional tax on all concessional contributions that you make or are made on your behalf. We are also unable to accept any after-tax contributions from you. For more information regarding the provision of TFNs please see the ‘Tax’ section in the Features Book. An exemption is not considered to be a TFN.

tax file number

4. Change of banking instructions

Complete your bank account details in this section and indicate what you would like us to use these bank account details for.

use account for	withdrawals		savings plan direct debits (Superannuation Plan only)		pension payments	
institution						
branch						
account name						
branch number (BSB)					account number	

Must be an Australian bank, building society or credit union account.

Note: If you provide us new bank account details we will require a copy of the bank account statement. Please provide this statement with your completed form.

5. Change of investment strategy

Only complete this section if you would like to update your investment strategy. The ‘new investment strategy’ percentage will be used for contributions, pension payments, auto-rebalancing and compulsory rebalancing (where applicable).

You specify what percentage of your portfolio you want in each investment option. Your total must be 100%.

Investment options	New Investment strategy %
Conservative	%
Diversified	%
Balanced	%
Growth	%
Hight Growth (Super and TTR only)	%
Cash	%
Australian Share (Super and TTR only)	%
International Share (Super and TTR only	%
Total	100%

please advise whether this change is for:
 ☐ Transition To Retirement (TTR)
 ☐ Term Allocated Pension (TAP)
 ☐ Account Based Pension (ABP)

pension payment amount (TTR only)
 ☐ minimum
 ☐ maximum
 or an amount (before tax) of \$

pension payment amount (TAP only)
 ☐ 'standard' amount
 ☐ less than 'standard' amount (maximum 10%) \$
 
☐ More than 'standard' amount (maximum 10%) \$

pension payment amount (ABP only)
 ☐ minimum
 or an amount (before tax) of \$

I would like to receive my first pension payment on the 25th day of
 
 (please specify month and year – subject to all documents being received seven [7] business day in advance)

I would like to receive my pension payments
 ☐ monthly
 ☐ quarterly
 ☐ half-yearly
 ☐ yearly

first name(s)																							
last name																							
																date	DD	/	MM	/	YY	YY	
authorised representative's signature																date	DD	/	MM	/	YY	YY	

**COMPANY SEAL**

[illegible]

9. Investor's signature (must be completed)

Important notes: Please ensure that you sign the form where indicated. Ensure that the form is signed as per the current signing instructions we have on record. If no amendments have been made, the current signatory for the account is the individual who signed the initial investment application form. If signed under Power of Attorney, the Attorney certifies that he or she has not received notice of revocation of the Power. The Power of Attorney or a certified copy must be sent to the Trustee if not previously provided. For enquiries or a copy of a current Product Disclosure Statement, call us on 1800 677 442 during business hours (Sydney Time).

investor's signature

date

D

D

/

M

M

/

Y

Y

Y

Y

9. Mailing instructions

Return this form to:  
Perpetual Select Super and Pension  
Reply Paid 95150  
PO Box 616  
Parramatta NSW 2124