

Change of Member Details

For assistance & enquiries: **Ph 132 467**

Please send this completed form to: **Intrust Super, GPO Box 1416, Brisbane QLD 4001**



Please write in BLOCK letters using a BLUE or BLACK pen. This request will be invalid if it is unsigned or undated.

You can change your contact details, update your beneficiaries and advise your TFN online. To register for MemberAccess, go to intrust.com.au

1: Current Member details [Please complete in full]

Intrust Super member number

Date of Birth (DDMMYYYY)

Mr/Mrs/Ms/Miss

Surname

Given Names

ONLY COMPLETE THE SECTIONS YOU WISH TO CHANGE

2: Changes to my name, date of birth and or signature

If you are changing your name, you must supply certified copies of evidence to support your change of details.

Please provide the appropriate document from the list below:

- Birth Certificate
- Certificate of Marriage
- Naturalisation Certificate
- Deed Poll
- Certificate of Divorce, Decree Nisis, Decree Absolute
- Statutory Declaration
- Drivers Licence

Date of Birth (DDMMYYYY)

Mr/Mrs/Ms/Miss

Surname

Given Names

Original signature of member

New signature of member (if different)

3: Changes to my contact details

Email

STREET ADDRESS

Street number

Street name

Suburb/Town

State

Postcode

POSTAL ADDRESS

Street number/PO Box

Street name

Suburb/Town

State

Postcode

Telephone (Home)

Mobile

PTO

4: Changes to preferred beneficiary nominations

[If you have more than 4, please photocopy this form]

Name of Beneficiary

Relationship [eg. Wife, Son]

Portion Of Benefit

 %

Name of Beneficiary

Relationship [eg. Wife, Son]

Portion Of Benefit

 %

Name of Beneficiary

Relationship [eg. Wife, Son]

Portion Of Benefit

 %

Name of Beneficiary

Relationship [eg. Wife, Son]

Portion Of Benefit

 %

5: Tax File Number [TFN]

Under the *Superannuation Industry [Supervision] Act 1993*, your superannuation fund is authorised to collect your TFN, which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change. Intrust Super may disclose your TFN to another superannuation provider when your benefits are being transferred, unless you request in writing to Intrust Super that your TFN not be disclosed to any other superannuation provider.

It is not an offence not to quote your TFN. However, giving your TFN to Intrust Super will have the following advantages [which may not otherwise apply]:

- Intrust Super will be able to accept all types of contributions to your account/s;
- the tax on contributions to your superannuation account/s will not increase;
- other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your superannuation benefits; and
- it will make it much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

Tax File Number

I authorise the use of my TFN for the SuperMatch service to find my lost super or inactive accounts.

6: Checklist

- Have you changed your details with your employer?
- Have you signed and dated this form?
- Have you attached certified photocopies of identification documents necessary to change your details [if applicable], e.g. a current driver's licence or passport issued by the Commonwealth. Call 132 467 if further examples are necessary.

7: Declaration

I declare that

- The information I have provided and any associated documentation in support of the changes advised in this form are, to the best of my knowledge, true and accurate
- I understand the Trustee will rely on this information in good faith and my record kept by the Trustee will reflect the information in this form
- I will immediately notify the Trustee if any of my personal details change in the future
- I understand and accept the information contained in this form may be shared with representatives, advisers and service providers of the Trustee and my employer[s], and
- The information provided in this form could potentially alter my entitlement eligibility and insurance arrangements [if applicable].

Signature of member

Date [DDMMYYYY]

Completing Proof of Identity

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Please attach certified copies of documentation to prove you are the person to whom the superannuation entitlements belong. Please select which documents you have attached to this form. [Only provide original documents if you are submitting this form in person at a Fund office].

The certification of your identification must be dated no more than 12 months prior to the date you have signed this form.

EITHER:

One of the following documents only:

- A current driver's licence or permit issued under the law of a State or Territory; or
- A passport issued by the Commonwealth which can be up to two years out of date;

that contains a photograph of the person in whose name the document is issued.

OR

One of the following documents:

- birth certificate or birth extract
- citizenship certificate issued by the Commonwealth
- pension card issued by Centrelink that entitles you to financial benefits.

AND

- letter from Centrelink regarding a Government assistance payment
- notice issued by Commonwealth, State or Territory Government within the past 12 months, containing your name and residential address

For example:

- > Tax Office Notice of Assessment
- > Rates notice from local council

If you are unable to provide accepted certified documents, please contact Intrust Super for other options.

Certification of personal documents

All copied pages of original proof of identification documents [including any linking documents] need to be certified as true copies by any individual approved to do so [see below]. The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification [eg Justice of the Peace, Australia Post employee, etc] and date. The following people can certify copies of the originals as true and correct copies:

- Justice of the Peace
- Police officer
- Holder of a statutory office not specified in another item in this list
- Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the *Marriage Act 1961*
- Minister of religion registered under Subdivision A of Division 1 of Part IV of the *Marriage Act 1961*
- Teacher employed on a full-time basis at a school or tertiary education institution
- Building society officer
- Credit union officer
- Finance company officer with 2 or more years of continuous service

EMPLOYMENT – GOVERNMENT

- Australian consular officer or an Australian diplomatic officer [within the meaning of the *Consular Fees Act 1955*]
- Employee of the Australian Trade 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
- 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 that Act

- 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
- 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 who is not specified elsewhere in this list
- Senior Executive Service employee of:
 - the Commonwealth or a Commonwealth authority; or
 - a State or Territory or a State or Territory authority

PROFESSIONAL AFFILIATIONS

- Member of:
 - Institute of Chartered Accountants in Australia
 - National Institute of Accountants
 - Australian Society of Certified Practising Accountants
- Member of:
 - Association of Taxation and Management Accountants
 - Australasian Institute of Mining and Metallurgy
 - Chartered Secretaries Australia
 - Engineers Australia, other than at the grade of student
- Fellow of:
 - National Tax Accountants' Association

AUSTRALIA POST

- Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the 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

LEGAL

- Chief executive officer of a Commonwealth court
- Judge of a court
- Magistrate
- Notary public
- 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]
- Registrar or deputy registrar of a court
- Bailiff
- Clerk of a court
- Commissioner for Affidavits
- Commissioner for Declarations
- Legal practitioner
- Master of a court
- Patent attorney
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- Sheriff
- Sheriff's officer
- Trade marks attorney

MEDICAL

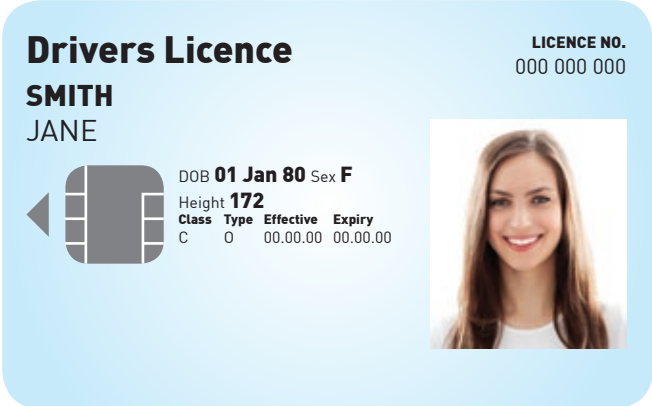
- Chiropractor
- Dentist
- Medical practitioner
- Nurse
- Optometrist
- Pharmacist
- Physiotherapist
- Psychologist
- Veterinary surgeon

EMPLOYMENT – FINANCE

- Officer with, or authorised representative of, a holder of an Australian financial services licence, having 2 or more continuous years of service with one or more licensees
- Bank officer

The person who is authorised to certify documents must sight the original and the copy to make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification [eg. Justice of the Peace, Australia Post employee, etc] and date.

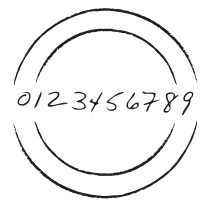
- Copy of the driver's licence [front] of the individual wishing to transfer the superannuation entitlement



- Certification and signature of authorised person

*Certified True Copy
S. Sample*

- Authorised person's stamp and registration number [if applicable]



- Name of authorised person
- Qualification of authorised person
- Date of authorisation

*Mr. Sam Sample
Justice of the Peace
00 1234 5678
1st July 2017*

