

CHANGE YOUR DETAILS FORM

To advise your tax file number (TFN) please go to **Member Online** or complete the **Providing your tax file number** form.

For assistance call us on **1300 133 177**.
Please send your completed form to:

**NGS Super
GPO Box 4303
MELBOURNE VIC 3001**

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Effective date of change / / for details in Steps 2, 3 or 4

[illegible][illegible]

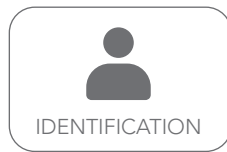
Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other

☐ I have attached a certified copy of my Marriage Certificate, Deed Poll, Decree Nisi, or change of name certificate from Births, Deaths and Marriages Registration office to support my name change.

How to certify documents

After sighting the original and the copy and making sure both documents are identical, the certifier must include on EACH page:

- written or stamped 'certified true copy'
- signature and printed full name
- qualification (such as Justice of the Peace, Australia Post employee with more than 2 years' continuous service, etc.)
- date (the date of certification must be within the 12 months prior to our receipt).



- ← A clear copy of the document that identifies you (i.e. your driver's licence (**front and back**) or passport).
- ← Write or stamp 'certified true copy' of the original document.
- ← The authorised person's signature.
- ← Full name, qualification and registration number (if applicable) of the authorised person.
- ← Date of certification (within 12 months of receipt by NGS).

Verification

A verification of the certifying party may be performed. If a discrepancy arises, you may be requested to re-certify documentation.

Important note

The information in this document is a guide only and we may request additional documentation prior to any payment.

Step 3. New contact details (if applicable)

New residential address

Suburb

State

Postcode

New postal address

Suburb

State

Postcode

New Telephone

New Mobile

New Email address

Step 4. Change to preservation status (if applicable)

For Transition to retirement accounts only

Complete this section if your circumstances that affect the Preservation status of your Transition to retirement account have changed.

If you elect to change your preservation status, your *Transition to retirement account* will be transferred to the Income account where investment earnings are tax free. Unless you advise otherwise, your investment option(s) will be transferred to the equivalent tax free investment option(s).

There is a limit on the amount you can transfer into the retirement phase of super. This is known as the transfer balance cap and is managed by the Australian Taxation Office (ATO). You have your own personal transfer balance cap which you can view through your ATO linked account by logging into **my.gov.au**

If by electing to change your preservation status, the value of all your accounts in the retirement phase would be in excess of the transfer balance cap, you should also complete a **Request for withdrawal form** and advise NGS in Step 3 of that form, where you would like your additional balance to be directed: as a cash payment or back into the Accumulation phase.

The preserved portion of your account cannot be released to unpreserved status until one of the following conditions have been met:

- you are at least 60 years of age and have ceased gainful employment since attaining age 60 even if you have not permanently retired
- you have reached your preservation age and have permanently retired from the workforce.

Permanently retired is defined as never being gainfully employed again for more than 10 hours per week. Gainful employment means employed or self-employed for gain or reward in any business, trade, profession, calling, occupation or employment. If you are eligible, please complete one of the following declarations.

(Select an option ☒)

- ☐ Yes, I am at least 60 years of age and I have ceased a gainful employment arrangement since attaining age 60 (even if not permanently retired).
- ☐ Yes, I have reached my preservation age and have permanently retired from the workforce.

Step 5. Sign the form

I authorise NGS Super to make the changes noted on this form in respect to the information provided in Steps 2, 3 and 4.

I have read and understand the **Privacy Collection Statement** available at ngssuper.com.au/pcs and consent to my personal information being collected, disclosed and used as described in that Statement.

Signature

X

Date

 / /

Please return your completed form to:

NGS Super
GPO Box 4303
MELBOURNE VIC 3001

Privacy Collection Statement

NGS Super Pty Limited ABN 46 003 491 487 of **Level 4, 14 Martin Place Sydney NSW 2000** collects personal information from you (or from third parties such as your employer or another super fund) to manage your NGS Super account, keep you informed, improve our products and services or take action on a matter you have contacted us about. If we don't have your personal information, we may not be able to perform these services. We may be authorised to collect your personal information by certain laws, including laws relating to superannuation, taxation and anti-money laundering/counter-terrorism financing.

We disclose personal information as required to manage the Fund, to service providers (including our administrator, our insurer and professional advisers), employers or parties required by law. Personal information may be accessed by service providers overseas, most likely by our administrator's processing centre in India. For any other offshore locations, details of how to access and change your personal information and the privacy complaints process, go to ngssuper.com.au/pcs and ngssuper.com.au/privacy or call us on **1300 133 177**.