

# Change Your Details Form

If you're changing your address, email or phone number, you can do this quickly and easily in **Member Online** — just go to [ngssuper.com.au/MOL](https://ngssuper.com.au/MOL) to login.

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

To update your preferred beneficiaries please complete the **Death benefit nomination** form. You can add a non-binding nomination in **Member Online**.

Both forms can be accessed on the NGS Super website at [ngssuper.com.au/forms](https://ngssuper.com.au/forms)

## If you need help

Getting advice on your NGS Super account is easy. Whether it's a simple check in to understand your options or comprehensive advice for you and your family, we have you covered. Contact us on **1300 133 177** to make an appointment or learn more at [ngssuper.com.au/advice](https://ngssuper.com.au/advice).

## Step 1. Complete your personal details

Please print in black or blue pen, in capital letters, one character per box.

Membership number

Date of birth

 /  / 

Given names

Surname

Phone number

 - 

Mobile

 - 

Personal email

Comments (if applicable)

Effective date of change

 /  / 

for details in Steps 2, 3 or 4

## Step 2. New name details (if applicable)

New surname (if changed)

New given names (if changed)

Select new Title (if changed)

☐

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).
- Certified true copy ← Write or stamp 'certified true copy' of the original document.
- J. Sample ← The authorised person's signature.
- Mr John Sample ← Full name, qualification and registration number (if applicable) of the authorised person.
- Justice of Peace
- Registration No. 123456789 ← Date of certification (within 12 months of receipt by NGS).
- Date: 31/12/2023

### 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 one 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](https://ngssuper.com.au/pcs) and consent to my personal information being collected, disclosed and used as described in that Statement.

Signature

X

Date

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Please return your completed form to:

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

or email to: [ngsadminteam@mercero.com](mailto:ngsadminteam@mercero.com)

## Privacy Collection Statement

NGS Super Pty Limited ABN 46 003 491 487 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](https://ngssuper.com.au/pcs) and [ngssuper.com.au/privacy](https://ngssuper.com.au/privacy) or call us on **1300 133 177**.