

# Reset form



Use this form to close your current *NGS Transition to retirement (TTR) account* and start a new *NGS TTR account* with additional funds.

If you want to commence a second *NGS TTR account*, (and keep your existing account), do not complete this form. You will need to complete the Application form available in the **NGS Retirement Product Disclosure Statement** at [ngssuper.com.au/PDS](http://ngssuper.com.au/PDS)

If you need help completing this form, you can book a chat with an NGS Super Specialist through [ngssuper.com.au/chat](http://ngssuper.com.au/chat)

If you're unsure of your decisions, consider obtaining professional advice. We offer:

- advice at no extra cost through our Financial Advice Helpline
- low-cost advice through NGS Financial Planning.

To make an appointment, call us on **1300 133 177** or complete the **Financial planning enquiry form** on our website at [ngssuper.com.au/advice](http://ngssuper.com.au/advice)

Please send your completed form to:

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

## Step 1. Complete your personal details

Please print in black or blue pen, in capital letters.

Existing **NGS TTR** member number   
 NGS account number (if known)

Title  Date of birth  /  /

Given names

Surname

Residential address (**must be provided**)

Suburb  State  Postcode

Postal address (if different to above)

Suburb  State  Postcode

Phone number  -  Mobile  -

Personal email — see note below

Please advise if you would like us to send you a Centrelink Schedule.  Yes  No

Alternatively, you can request this at any time by calling us on **1300 133 177**.

### Providing your email address

By providing us with your email and/or mobile number, the trustee will provide information such as annual reports, member statements, exit statements and notices of any material changes or occurrence of significant events electronically, rather than in paper form. If you would prefer to receive notifications by post, you can change your preferences in **Member Online** or by contacting us.

Are you intending to claim a tax deduction for personal contributions you have made to your super account with NGS or another fund?

You should complete the **Notice of intent to claim a tax deduction** form **before** requesting a withdrawal.

**You will not be able to claim a tax deduction if the transfer occurs first.** Find out more at [ngssuper.com.au/deductions](http://ngssuper.com.au/deductions)

## Step 2. Funding your new account

I wish to reset the full balance of my existing *NGS TTR account* (account number as shown in Step 1) with the investments as outlined below. **The minimum balance required to start an *NGS TTR account* is \$20,000.**

Please select all relevant investments to be transferred in addition to your *NGS TTR account*.

- Transfer the following amount from my *NGS Accumulation account* number:**   
**(the minimum remaining balance for my *NGS Accumulation account* to stay open is \$10,000)**  
(select one option only ✓)
- Total account balance
- Partial transfer of \$
- Retain \$  in my *NGS Accumulation account* and transfer the balance to my new *NGS TTR account*

### NGS Self-Managed investments — For members invested in this option only

We do not offer the DIO option in the *NGS TTR account*. If you wish to maintain investments in your DIO option in your *NGS Accumulation account*, you will still need to meet the investment limit (maximum 80% of your *NGS Accumulation account* invested in the DIO option) after transferring your initial investment to your *NGS TTR account*.

If you wish to transfer some or all of the value in your existing investment in the DIO option to your *NGS TTR account*, you must first transfer these investments back into your pre-mixed or sector-specific investments using **Member Online** at [ngssuper.com.au/mol](http://ngssuper.com.au/mol). Please note, transferring money from DIO may take some time to complete. Refer to the **NGS Self-Managed guide** for details.

**Rollover from other funds:**

	Name of other fund	Amount to be invested
Rollover from	<input type="text"/>	<input type="text"/>
Rollover from	<input type="text"/>	<input type="text"/>
Rollover from	<input type="text"/>	<input type="text"/>
<b>Total rollover amount</b>		<input type="text"/>

Note: Your new *NGS TTR account* will **not** commence until all of your rollovers listed above have been received. You will need to organise any rollovers by either completing a **Transfer authority form** available at [ngssuper.com.au/forms](http://ngssuper.com.au/forms) or contacting your other super fund.

### Step 3. Set up your investments, income payments and drawdown strategy using Easy Default

Would you like to set up your account using **Easy Default**?

- Yes** – Complete steps 7 through to 10 (do not complete steps 4, 5 and 6).
- No** – Complete steps 4 through to 10.

**Easy Default** provides you with the following investment and income payment options:

- ✓ Your account is invested in the Diversified investment option (the default option).
- ✓ Income payments are drawn from the Diversified option, and will be paid fortnightly.
- ✓ The minimum required income payment amount will apply (currently 4% p.a. of the account balance).

For more details refer to the **NGS Retirement Product Disclosure Statement** available at [ngssuper.com.au/PDS](http://ngssuper.com.au/PDS)

Your payments will commence on the first available pay date after your account has been established.

You can change your investment strategy, payment frequency and payment amount at any time via [Member Online](#).

## Step 4. Choose your investment options for your account balance

Select **Option 1** to apply the default option for your account, or **Option 2** or **3** to select your own investment option/s.

If you don't select an option or your selection is invalid, the default option will apply.

**Option 1: Select the default option for your account**

Your account balance will be invested in the **Diversified** option (the default option). **Your income payments will be drawn from the Diversified option. Go to Step 6.**

### Select your own investment option/s for your account

**Option 2:** I wish to have my initial investment allocated in the same way as my current account is invested in my: (select one option only ✓)

- NGS Accumulation account
- NGS Transition to retirement account

**Please note,** your initial investment will be allocated in the same proportions as your *NGS Accumulation account* is currently invested in unitised investment options. Any investment in the **NGS Self-Managed DIO option** will be excluded. The DIO is not available in the *NGS Transition to retirement (TTR) account*. Please refer to the **NGS Self-Managed guide** for further information on the asset transfer facility for the funds held within your NGS Self Managed DIO.

**Option 3:** I wish to have my initial investment allocated between the following investment options. The percentages must add up to 100%.

For more detailed information about each investment option, go to [ngssuper.com.au/performance](http://ngssuper.com.au/performance) or the **NGS Retirement Product Disclosure Statement**.

Percentage to be invested	Pre-mixed options
<input type="text"/> <input type="text"/> <input type="text"/> %	Diversified — <i>default investment option</i>
<input type="text"/> <input type="text"/> <input type="text"/> %	High Growth
<input type="text"/> <input type="text"/> <input type="text"/> %	Balanced
<input type="text"/> <input type="text"/> <input type="text"/> %	Defensive
<input type="text"/> <input type="text"/> <input type="text"/> %	Indexed Growth
<b>Sector-specific options</b>	
<input type="text"/> <input type="text"/> <input type="text"/> %	Australian Shares
<input type="text"/> <input type="text"/> <input type="text"/> %	International Shares
<input type="text"/> <input type="text"/> <input type="text"/> %	Infrastructure
<input type="text"/> <input type="text"/> <input type="text"/> %	Property
<input type="text"/> <input type="text"/> <input type="text"/> %	Diversified Bonds
<input type="text"/> <input type="text"/> <input type="text"/> %	Cash & Term Deposits
<b>1 0 0</b> %	<b>TOTAL</b>

## Step 5. Choose your investment options for your drawdown strategy (income payments)

Complete this step only if you completed **Option 2** or **Option 3** at **Step 4** to select your own investment options. Complete 1 of the following 3 options to select the drawdown strategy for your account.

**If you do not complete this step, payments will be drawn proportionally from the balance in each investment option.** (select one option only ✓)

### Option 1: Proportionally from each investment option

Please make payments proportionally from each investment option. This means that as each investment moves up and down in value, the income payment will be paid in direct correlation with the balance held in each option.

If you wish to have your payments made from nominated investment options or a priority election, please choose either Option 2 or Option 3, but not both.

### Option 2: Nominated percentage drawdown

You can choose to have your payments made from one or more of the pre-mixed or sector-specific investment options you have chosen above for your account balance. For example, if your account is invested in 80% Diversified default option and 20% Balanced option, you could choose to have your payments made from the Balanced option only. Alternatively, you can choose to have payments deducted proportionally from all your options. Once there's no longer enough money in your chosen option(s), payments will automatically be deducted proportionally from the balance(s) invested in your other option(s). You'll be notified at the time, and you can adjust your investment choice accordingly.

#### Percentage to be drawn down Pre-mixed options

<input type="text"/> <input type="text"/> <input type="text"/> %	Diversified — <i>default investment option</i>
<input type="text"/> <input type="text"/> <input type="text"/> %	High Growth
<input type="text"/> <input type="text"/> <input type="text"/> %	Balanced
<input type="text"/> <input type="text"/> <input type="text"/> %	Defensive
<input type="text"/> <input type="text"/> <input type="text"/> %	Indexed Growth

#### Sector-specific options

<input type="text"/> <input type="text"/> <input type="text"/> %	Australian Shares
<input type="text"/> <input type="text"/> <input type="text"/> %	International Shares
<input type="text"/> <input type="text"/> <input type="text"/> %	Infrastructure
<input type="text"/> <input type="text"/> <input type="text"/> %	Property
<input type="text"/> <input type="text"/> <input type="text"/> %	Diversified Bonds
<input type="text"/> <input type="text"/> <input type="text"/> %	Cash & Term Deposits

<input type="text"/> <input type="text"/> <input type="text"/> %	<b>TOTAL</b>
--	--------------

## Step 5. (continued)

### Option 3: Priority drawdown

You can choose the pre-mixed and sector-specific investment options from which payments are drawn by electing a drawdown order. Payments will only be drawn from one investment option at a time. After your first nominated investment option is depleted, payments will then be drawn from your next nominated option until this has been depleted and will continue down your drawdown order. For example, if your account balance is invested in 50% Diversified default option, 25% Balanced option and 25% High Growth option you could choose to have your payments drawn down in the order of 1. Balanced, 2. High Growth and 3. Diversified.

Where the selected options have an insufficient balance, your income payments will be drawn proportionally from the balance(s) invested in your remaining investment option(s). You'll be notified at the time, and you can adjust your investment choice accordingly.

#### Drawdown order (number 1, 2 etc as required):

##### Pre-mixed options

- Diversified — *default investment option*
- High Growth
- Balanced
- Defensive
- Indexed Growth

##### Sector-specific options

- Australian Shares
- International Shares
- Infrastructure
- Property
- Diversified Bonds
- Cash & Term Deposits

If in the future you change your investment options, the above instruction will become invalid and cease to apply. You can provide a new priority drawdown instruction when you change your investment options or at any other time.

## Step 6. Choose your payment frequency and amount

**Payment frequency:** (select one option only ✓) If you don't select a frequency, your payments will be paid fortnightly.

Fortnightly (default option)  Monthly  Quarterly  Six-monthly  Yearly

### Payment start date

For accounts starting between 1 June and 30 June, confirm if you would like to defer your first payment until the next financial year.

For all new accounts, please advise the date you wish to commence your payments, otherwise your payments will commence on the first available pay date.

Starting month and year   /

Your payment will be paid on the fifteenth of the month (excluding fortnightly payments).

### Nominated payment amount

Please nominate the amount you wish to receive from **your pre-mixed and/or sector-specific investments** as per step 5: If you don't select an amount, the minimum required percentage payment amount will apply (currently 4% p.a. of the account balance). (select one option only ✓)

- \$  , per payment. Payments must be above the minimum legislated payment amount.
- % p.a. (nominate an annual percentage between your minimum amount and 10%)<sup>1</sup>
- Minimum amount permitted per financial year – default amount (refer to the **NGS Retirement Product Disclosure Statement**)
- Maximum amount of 10% **pro-rated** in the first financial year (i.e. less than 10% of initial account balance will be paid)
- Maximum amount of 10% **paid in full** in the first financial year (i.e. 10% of initial account balance will be paid)

1. The percentage will be converted to a dollar amount based on your initial balance, which will continue to apply in future financial years, unless it needs to be adjusted to comply with regulatory minimum or maximum limits. Your payment amount will generally be pro-rated based on the number of payments remaining in the first financial year.

### Optional annual increase to your nominated payment amount (if left blank no increase will be applied)

Your payments will increase from 1 July each year by the percentage you select, unless you change this at a future date. (select one option only ✓):

Nil  Consumer Price Index  Nominated percentage:   .  %

Note that any increase is subject to the minimum and maximum payment amounts permitted.

## Step 7. Complete your payment details

Please pay my pension into my nominated account as follows:

- Option 1** — Please pay into my bank account using the details from my existing *NGS TTR* account.
- Option 2** — Please pay into my new bank account using the details below.

Please provide proof of your bank account details such as a statement that shows your BSB number, your bank account number and your account name.

### Financial institution

### Account holder's name<sup>^</sup>

### BSB

### Account number

Money cannot be paid into a credit card account or a third party account. We will take care to ensure your money is paid in line with the details you have provided. We accept no responsibility for any loss which occurs as a result of incorrect bank details you provide us. If the bank rejects the payment of your money we will pay you by cheque. Please note, bank fees may be charged for telegraphic transfers to international bank accounts and will be deducted from your payments.

<sup>^</sup> This must be a personal account, held solely or jointly in your name.

## Step 8. Nominate your beneficiaries

If you die, the balance of your *NGS TTR account* may be paid to your spouse, dependants or estate. You have the option of:

- (1) nominating a **reversionary** beneficiary OR
- (2) making a **non-binding** nomination OR
- (3) making a **binding** (lapsing or non-lapsing) nomination.

If you do not nominate a reversionary beneficiary or make a binding (lapsing or non-lapsing) nomination, NGS Super ('the trustee') will determine to which of your dependants and/or your estate your account balance will be paid. Your nomination will be taken into account if we hold a completed form when the trustee makes their determination.

For more details, refer to our fact sheet **Nominate your beneficiaries** available at [ngssuper.com.au/factsheets](http://ngssuper.com.au/factsheets)

**If you wish to nominate a reversionary beneficiary, you must do so here using the application form. You will not be able to nominate a reversionary beneficiary once this account commences.**

### Option 1: Reversionary nomination

**You can't change or remove the reversionary beneficiary on your account once your account starts.**

You can make a reversionary beneficiary nomination only during the process of opening your account. Your reversionary beneficiary will receive ongoing regular payments from your account if you die, provided they meet the definition of dependant at the time of your death.

If you wish to change your reversionary beneficiary after your account starts, you'll need to commute (stop) this account and start a new one. This may have other financial implications (e.g. for any Centrelink or DVA benefits or aged care arrangements).

Given Name

Surname

Relationship to you

Date of birth

/

/

### Option 2: Non-binding nomination

If you make a non-binding nomination, the trustee is not legally bound by your wishes but will take them into account. If you want to make a non-binding nomination, please complete the **Death benefit nomination form** available at [ngssuper.com.au/forms](http://ngssuper.com.au/forms), then attach it to this application.

### Option 3: Binding nomination

If you make a valid binding nomination, the trustee has no discretion to decide who is to receive your death benefit. Your death benefit must be paid to your nominated beneficiaries.

If you wish to make a **binding** nomination, please complete the **Death benefit nomination form** available at [ngssuper.com.au/forms](http://ngssuper.com.au/forms), then attach it to this application.



## Step 9. Attach proof of identity

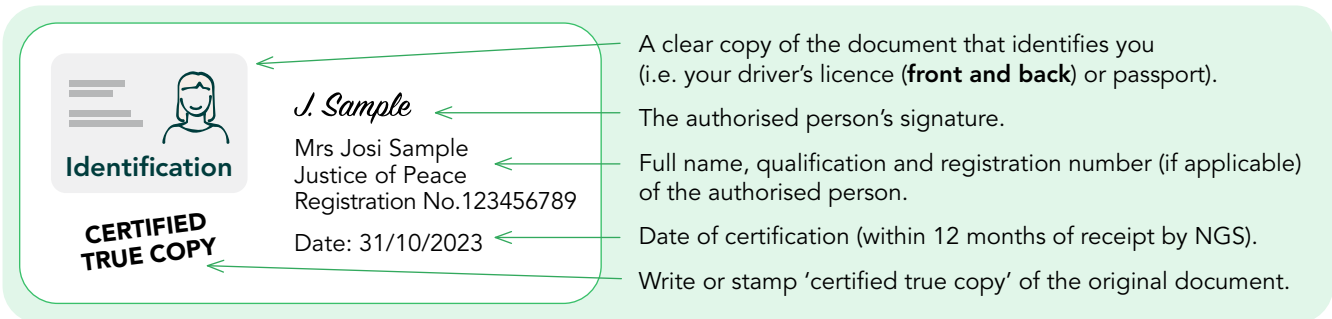
For identification purposes, you **MUST** attach a certified copy of either your driver's licence (front and back) or passport (or acceptable alternatives).

You can have these documents certified by a number of people including either a full-time teacher or by a post office employee with more than 2 years' continuous service. For a full list of people who can certify documents and acceptable alternative documents, please visit [ngssuper.com.au/poi](https://ngssuper.com.au/poi). An example of how to certify documents is shown below. Failure to provide appropriate proof of identification may result in delays in the processing of your payment(s).

### 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).



The diagram illustrates a certified copy of a document. On the left, there is a box representing the original document with a person icon and the word "Identification". Below it, the text "CERTIFIED TRUE COPY" is stamped. To the right of the box, the following information is written: a signature "J. Sample", the full name "Mrs Josi Sample", the qualification "Justice of Peace", the registration number "Registration No. 123456789", and the date "Date: 31/10/2023". Five callout lines point from the text on the right to the corresponding elements in the diagram:

- ← A clear copy of the document that identifies you (i.e. your driver's licence (**front and back**) or passport).
- ← 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).
- ← Write or stamp 'certified true copy' of the original document.

### 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 10. Sign the form

Your application will not be accepted unless you have signed this declaration. By signing this form I:

- declare I have read and understood the **NGS Retirement Product Disclosure Statement**
- declare all the information I have provided is true and correct
- acknowledge that I have received all information I require in order to exercise the choices I have made, including where I can find the **Target Market Determination**
- understand that default options for my investment options, income payments, and drawdown strategy will apply if I chose these options, did not provide specific instructions at the relevant steps, or selected the Easy Default option
- accept that I will be bound by the provisions of the Trust Deed and rules which govern the operation of NGS Super
- acknowledge that if I've provided my email address details in this application form, the trustee will use that email address to send information, including any annual reports, member and exit statements and notices of any material changes or the occurrence of significant events, by electronic means. I can change this preference through **Member Online** or by contacting NGS Super
- confirm that I am an Australian resident.

I consent to my personal information being collected, disclosed and used as described in the **Privacy Collection Statement**. To view our Privacy Collection Statement, **go to [ngssuper.com.au/pcs](https://ngssuper.com.au/pcs)** or call us on **1300 133 177**

Signature

Date

 /  / 

**Please return your completed form together with your:**

- **proof of identity**
- **copy of supporting bank account details if you are requesting payments to be made into a new bank account and**
- **Death benefit nomination form (if applicable) to:**

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

**You may like to make a copy for your records.**