NGS Income account and Transition to retirement account

Request to vary your income stream payments

Use this form to vary your income stream payments for *NGS Income account* and *NGS Transition to retirement account*.

Please send your completed form to:

NGS Super
GPO Box 4721
MELBOURNE VIC 3001

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**

Step 1. Complete your personal details

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

NGS member number | and account number (if known)

Account type: (select one option only ✓)

◯ *Income account* ◯ *Transition to retirement (TTR) account*

Title | Date of birth (/ /)

Given names

Surname

Residential address (**must be advised**)

Suburb | State | Postcode

Postal address (if different to above)

Suburb | State | Postcode

Daytime telephone number (–)

Mobile (–)

Personal email

Issued by NGS Super Pty Limited ABN 46 003 491 487 AFSL No 233154 the trustee of NGS Super ABN 73 549 180 515

Step 2. Provide new payment instructions

1. **I wish to alter my income payments as follows:** (select one option only ✓)

   ◯ **Change my pension payment amount for the remainder of the financial year**

   The nominated payment amount (as selected below) will be paid from the date nominated by you or the date the change is made by us. Please note, the payment will be made proportionally for the rest of the financial year.

   ◯ **Change my pension payment amount for the complete financial year**

   This nominated payment amount (as selected below) will reflect the total amount to be paid for the current financial year. Payments you have already received this financial year will be taken into consideration in calculating your payments for the rest of the financial year.

   ◯ **Cease payments until the next financial year as I have met the minimum required payments for this financial year**

   Payments will restart at the first nominated day after the next 1 July on your current payment frequency and amount, unless you also nominate a change below.

2. **I wish for my next payment to occur:**

   M M / Y Y Y Y

3. **I elect for my frequency of payments from the date above to be:** (select one option only ✓)

   Your payment will be paid on the 15th of the month (with the exception of fortnightly payments).

   ◯ Fortnightly ◯ Monthly ◯ Quarterly ◯ Six-monthly ◯ Annually

4. **I wish for my nominated payment to be as follows:** (select one option only ✓)

   Refer to the **NGS Retirement Product Disclosure Statement** for minimum and maximum payment limits.

   ◯ Nominated amount of $ [1] per period (fortnightly, monthly, quarterly, six-monthly, annually)

   ◯ Minimum amount permitted per financial year

   ◯ Maximum amount permitted (only applicable for *Transition to retirement (TTR) account*)

1. Your nominated amount is subject to the minimum payment amounts permitted. If you are a TTR member, your nominated amount is also subject to a maximum amount permitted.

If you have an existing annual increase of your nominated payment, this will now be based on the new payment amount advised above.

Step 3. Optional annual increase to your nominated payment amount

Please begin/change my current automatic annual payment increase to apply from next 1 July as follows
(select one option only ✓)

◯ A nominated percentage of . %

◯ The annual change in the consumer price index (CPI)[2]

◯ Cancel my automatic annual increase

The automatic annual increase selected above will be applied on next 1 July to your current regular payment amount at that time. Any increase is subject to the minimum and maximum payment amounts permitted, where applicable.

2. This rate will be sourced from the Australian Bureau of Statistics using the annual change in line with the March quarter CPI, All Groups value each year.

Step 4. Bank account details

Please pay to my nominated account as follows:

- ◯ Existing bank account (proceed to step 5)
- ◯ New bank account as detailed below:

Financial institution

BSB

Account number

Account holder's name^

Payments can only be made to an Australian bank account. Please provide proof of your account details such as a statement that shows your BSB number, your bank account number and your account name. The statement provided must be dated within the last 6 months.

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

^ *This must be a personal account, held solely or jointly in your name.*

Step 5. Sign the form

By signing this form I understand that:

- I have read and understood this form.
- I understand that the information contained in this form will be handled by the trustee to process my income payment variation.
- I understand that if I select to automatically increase my income stream payment annually, unless I otherwise advise, the nominated increase will apply from 1 July each year subject to the legislated minimum and maximum income stream payment requirements.
- I understand that if I change my regular income stream payment to either the minimum or maximum payment allowable, my nominated increase will cease to apply immediately.
- I understand that under Tax Office regulations, I must keep a copy of this form for 5 years from the date completed.

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** or call us on **1300 133 177**.

Signature

Date / /

Please return your completed form to:

NGS Super, GPO Box 4721, MELBOURNE VIC 3001