

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 4303
MELBOURNE VIC 3001

or email to: ngsadminteam@mercer.com

If you need help

If you're unsure of your decision, consider getting professional advice. We offer:

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

To speak to the Financial Advice Helpline or to make a financial planning appointment, call us on **1300 133 177** or complete the **Financial planning enquiry form** on our website 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 NGS account number (if known)

<input type="text"/>	<input type="text"/>
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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

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Mobile

 -

Personal email

Step 2. Provide new payment instructions

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

Change my income 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 proportionately for the rest of the financial year.

Change my income 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
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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[^]

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

For identification purposes you **MUST** attach a 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 authorise 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:

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or email to: ngsadminteam@mercer.com