

# RESET FORM

Before applying to open an NGS Income account, make sure you read our **Product Disclosure Statement**. You can also view our **Target Market Determinations** at [ngssuper.com.au/TMD](http://ngssuper.com.au/TMD)

Use this form to close your current NGS Income account and start a new NGS Income account with additional funds.

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

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

We offer low-cost tailored advice through NGS Financial Planning on all your financial needs.

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, one character per box.*



Your existing **NGS Income account** number:

and Policy 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

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.

## Step 2. Eligibility to open an *Income* account

I declare that I: **(select one option only )**

- am no longer in paid employment due to total and permanent disablement (we will require evidence of your permanent incapacity).
- have reached my preservation age and am no longer gainfully employed. I am not intending to rejoin the workforce either full-time or part-time at any time in the future.
- am at least 60 years of age and have ceased a gainful employment arrangement since turning 60, even if I am not retired.
- am at least 65 years of age.

## Step 3. Funding your new account

I wish to reset the full balance of my existing *NGS Income* account (policy number as shown in Step 1) with the investments as outlined below.

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

- Transfer the following amount from my *NGS Accumulation* account number**            
**(the minimum remaining balance for this 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 Income* account
- Transfer the balance from my *NGS Transition to retirement* account number**

### NGS Self-Managed Direct Investment Option (DIO) — For members invested in this option only

If you have any investments in the *NGS Self-Managed Direct Investment Option (DIO)* within your ***NGS Accumulation* account**, these investments will need to transfer entirely into the new *NGS Income* account unless you request otherwise here. Partial transfer of investments in the *NGS Self-Managed DIO* is not available.

- Please retain my entire investments in the *NGS Self-Managed DIO* in my *NGS Accumulation* account. I understand that:
  - these will **not** transfer to my new *NGS Income* account
  - I must continue to meet the *NGS Accumulation* account investment limits outlined in the ***NGS Self-Managed guide*** for pre-mixed and sector-specific options following transfer of money from these options into my *Income* account.

- Rollover from other funds:**

	Name of other fund	Amount to be invested
Rollover from	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Rollover from	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Rollover from	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>Total initial investment (minimum \$20,000)</b>		\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

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

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

You should complete the relevant form to **notify your intent to claim a tax deduction 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](https://ngssuper.com.au/deductions)

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

You must select one of the following 2 options to choose how your account balance will be invested.

**If you do not complete this section, we cannot accept your application.**

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

You can choose to invest your new *NGS Income account*:

- in the same way one of your existing NGS accounts is currently invested or
- in one or more investment options in any percentage ensuring the total adds up to 100%.

For more detailed information about each investment option, go to [ngssuper.com.au/performance](https://ngssuper.com.au/performance)

**Please note**, if you have any investments in the **NGS Self-Managed Direct Investment Option (DIO)** within your **NGS Accumulation account**, these will transfer entirely into the new *NGS Income account* unless you have requested for this not to occur in Step 3. Please refer to the **NGS Self-Managed guide** for information on the asset transfer facility for the funds held within your NGS Self-Managed DIO.

**Option 1:** I wish to have my 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
- NGS Income account

**Option 2:** I wish to have my initial investment (excluding any transferring NGS Self-Managed DIO balance) allocated between the following investment options. The percentages must add up to 100%.

Pre-mixed options	Percentage to be invested
Diversified	<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	<input type="text"/> <input type="text"/> <input type="text"/> %
Retire Plus	<input type="text"/> <input type="text"/> <input type="text"/> %
<b>Sector-specific options</b>	
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>	<b>1 0 0</b> %

### NGS Self-Managed Direct Investment Option (DIO)

This option includes a choice of ASX-listed companies, exchange traded funds (ETFs) and term deposits. For details about the NGS Self-Managed DIO please refer to the **NGS Self-Managed guide** available at [ngssuper.com.au/PDS](https://ngssuper.com.au/PDS). You can also view our **Tarket Market Determinations** at [ngssuper.com.au/TMD](https://ngssuper.com.au/TMD)

**Please note, this form does not allow you to invest in this option.**

This option is available for members who will accept responsibility for their own investment decisions. To participate in this option you will need to log in to your **Member Online** account once your *NGS Income account* is set up. Once you are logged in to **Member Online**, you will be able to actively trade using your trading password via the NGS Self-Managed DIO. You will also be able to transfer to and from your investments held in the pre-mixed or sector-specific options and your NGS Self-Managed DIO.

Please note, there are limits regarding the **maximum percentage** that can be held in the NGS Self-Managed DIO. Further details can be found in the **NGS Self-Managed guide**.

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

Please complete one of the following 3 options for your drawdown strategy. If you do not complete this section, your income payments will be drawn proportional to each investment option in your account.

(Select one option only )

### Option 1: Proportional to each investment option

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

### 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 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 from the account balance invested in your other option(s). You'll be notified at the time, and you can adjust your investment choice accordingly.

Pre-mixed options	Percentage to be drawn down
Diversified	<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	<input type="text"/> <input type="text"/> <input type="text"/> %
Retire Plus	<input type="text"/> <input type="text"/> <input type="text"/> %
<b>Sector-specific options</b>	
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>	<b>1 0 0</b> %

### 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 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.

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

Pre-mixed options:	Sector-specific options:
<input type="checkbox"/> Diversified	<input type="checkbox"/> Australian Shares
<input type="checkbox"/> High Growth	<input type="checkbox"/> International Shares
<input type="checkbox"/> Balanced	<input type="checkbox"/> Infrastructure
<input type="checkbox"/> Defensive	<input type="checkbox"/> Property
<input type="checkbox"/> Indexed Growth	<input type="checkbox"/> Diversified Bonds
<input type="checkbox"/> Retire Plus	<input type="checkbox"/> 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. Decide on your payment amount

### Payment frequency: (select one option only)

Fortnightly  Monthly  Quarterly  Six-monthly  Yearly

### Payment start date

Please advise from when you wish to commence your payments:

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 investment** as per step 5: (select one option only)

Minimum amount permitted (refer to page 9 of our **Income account guide**) per financial year

\$  per payment

% (nominate an annual percentage above your minimum amount)

### 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 payment amounts permitted.

## Step 7. Choose a payment amount for your first financial year

In the first financial year your account commences, we will pay you in accordance with the amount you have nominated in Step 6 above, unless you choose a higher amount.

You may be able to choose a higher amount in the first financial year your account commences. For example, if you start your account in January and there are 6 scheduled monthly payments remaining to 30 June, you could choose to receive your first 6 payments at the rate of your normal nominated amount, as follows:

**(the \$amount nominated in Step 6 above) x 12**

**6**

This amount would therefore be twice the normal rate of payment, but only for the remainder of the first financial year.

Do you wish to receive a higher amount in the first financial year, based on the *annualised* amount nominated in Step 6 above and paid over the number of scheduled payments remaining to the next 30 June?

Yes  No

## Step 8. 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 Income 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 held in the name of ^

### 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.

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

## Step 9. Nominate your beneficiaries

If you die, the balance of your *NGS Income 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/PDS](http://ngssuper.com.au/PDS)

**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 cannot change or remove your reversionary beneficiary once your account starts)**

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 10. 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](http://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).



← 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 ← Date of certification (within 12 months of receipt by NGS).  
← Registration No.123456789  
← Date: 20/04/2022

### 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 11. Sign the form

Your application will not be accepted unless you have signed this declaration.

By signing this form I:

- 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**
- 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**.

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.**

## 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/pcs](https://ngssuper.com/pcs) and [ngssuper.com/privacy](https://ngssuper.com/privacy) or call us on **1300 133 177**.