

NGS Transition to retirement account

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 **Transition to retirement guide** at ngssuper.com.au/PDS

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, contact us on **1300 133 177** or complete the **Financial planning enquiry form** at 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. A

Your existing **NGS TTR 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.

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/deduction

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. Funding your new account

I wish to reset the full balance of my existing *NGS TTR 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 TTR 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 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. 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"/> <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"/> <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"/> <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"/> <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"/>
Total initial investment (minimum \$20,000)		\$ <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"/>

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 or contacting your other super fund.

Step 3. Choose your investment options for your account balance

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

- in the same way your *NGS Accumulation account* or *NGS TTR account* is currently invested, or
- in one or more investment options in any percentage ensuring the total adds up to 100%.

If you don't make a selection or your selection is invalid, we will invest your account balance in the default option — the Diversified (MySuper) option.

For more detailed information about each investment option, go to ngssuper.com.au/performance

Option 1: I wish to have my investment allocated in the same way as my account is currently invested in my: **(select one option only)**

NGS Accumulation account

NGS TTR account

Option 2: I wish to have my initial investment allocated between the following investment options.

Pre-mixed options	Percentage to be invested			
Diversified (MySuper) — <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	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
Sector-specific options				
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"/>	%
TOTAL	1	0	0	%

Step 4. Choose your investment options for your income payments

If you do not complete this section of the form, payments will be drawn proportional to each investment option.

(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.

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 (MySuper) 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 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 (MySuper) — <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	<input type="text"/> <input type="text"/> <input type="text"/> %
Sector-specific options	
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"/> %
TOTAL	1 0 0 %

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 (MySuper) 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 (MySuper).

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

Pre-mixed options:	Sector-specific options:
<input type="checkbox"/> Diversified (MySuper) — <i>default investment option</i>	<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"/> 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 5. 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 15th 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 4: (select one option only)

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

\$ per payment

Maximum amount permitted (currently 10%) per financial year.

% (nominate an annual percentage between your minimum amount and 10%)

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 6. 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 5 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 a higher rate than your normal nominated amount, as follows:

(the \$amount nominated in Step 5 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 5 above and paid over the number of scheduled payments remaining to the next 30 June?

Yes No

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 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 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 its determination. For more details, refer to our fact sheet

Nominate your beneficiaries available at 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, 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, 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. 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).



← Certified true copy
← *J. Sample*
← Mr John Sample
← Justice of Peace
← Registration No.123456789
← Date: 20/04/2022

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

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:

- 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 and ngssuper.com/privacy or call us on **1300 133 177**.