

# CHANGE DETAILS ADVICE

If you wish to advise your Tax File Number (TFN) please complete the **Providing your tax file number** form.

If you wish to update your preferred beneficiaries please complete the **Nominating your beneficiaries** form.

Both forms can be accessed on the NGS Super website [www.ngssuper.com.au/forms](http://www.ngssuper.com.au/forms).

## If you need help

For assistance call NGS Super Customer Service Team on **1300 133 177**.

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.



Membership number

Date of birth

Given names

Surname

Daytime telephone

Mobile

E-mail

Comments (if applicable)

Effective date of change  /  /  for details in Steps 2, 3 or 4

### Step 2. Advise details of new name (if applicable)

New surname

New given names (if changed)

Select new Title (if changed)

Mr  Mrs  Ms  Miss  Other

I have attached a certified copy of my Marriage Certificate, Deed Poll or change of name certificate from Births, Deaths and Marriages Registration office to support my name change.



### 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, 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 ←

Registration No. 123456789 ← Date of certification (within 12 months of receipt by NGS)

Date: 01/02/2017 ←

### 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 3. Advise details of new address (if applicable)

### Address

New residential address

Suburb

State

Postcode

New postal address (if different to above)

Suburb

State

Postcode

## Step 4. Change to preservation status

For *Transition to retirement* accounts only

**Complete this section if your circumstances that affect the preservation status of your *Transition to retirement* account have changed.** If you elect to change your preservation status, your *Transition to retirement* account will be transferred to the *Income* account where investment earnings are tax free.

Please note that a transfer balance cap of \$1.6m is applied on the amount of super you can transfer into the retirement phase once you meet a condition of release. This is known as the transfer balance cap (TBC) and applies as a **total across all your super accounts** and not per fund.

If by electing to change your preservation status, the value of all your accounts in the retirement phase would be in excess of the TBC, you should also complete a *Transition to retirement withdrawal form* and advise NGS in Step 3 of that form, where you would like your additional balance to be directed: as a cash payment or back into the Accumulation phase.

The preserved portion of your account cannot be released to unpreserved status until one of the following conditions have been met:

- you are at least 60 years of age and have ceased gainful employment since attaining age 60 even if you have not permanently retired;

OR

- you have reached your preservation age which is currently 56 (or 57 if you were born between 1 July 1961 and 30 June 1962) and have permanently retired from the workforce.

Permanently retired is defined as never being gainfully employed again for more than 10 hours per week. Gainful employment means employed or self-employed for gain or reward in any business, trade, profession, calling, occupation or employment. If you are eligible, please complete one of the following declarations.

(Select an option )

- Yes, I am at least 60 years of age and I have ceased gainful employment since attaining age 60.
- Yes, I have reached my preservation age and have permanently retired from the workforce.

## Step 5. Sign the form

I authorise you to make the changes noted on this form in respect to the information provided in Steps 2, 3 and 4.

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 to:**

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



# PRIVACY COLLECTION STATEMENT

## If you are a member of NGS Super, or you are applying for membership

We may collect your personal information from you or from third parties such as

- your employer
- a previous super fund
- your financial adviser
- our related entities
- publicly available sources.

We may be required or authorised by law to collect your personal information. Relevant laws include the Australian Securities and Investments Commission Act 2001, Corporations Act 2001, Family Law Act 1975 and laws relating to superannuation, taxation and anti-money laundering/counter-terrorism financing.

If we are unable to collect all the personal information we have asked for, we may not be able to administer your NGS Super account or take action on a particular request you have made.

**We will use your personal information to**

- manage your NGS Super account (*Accumulation, Transition to retirement or Income account*)
- give you information about your NGS Super account
- supply you with information about other products and services offered by us or our related companies
- include your relevant account data in statistics and market research.

**We will disclose your personal information to** various organisations (but only as required to manage your NGS Super account or the Fund generally), including

- our administrator, Mercer Outsourcing (Australia) Pty Ltd (Mercer)
- our insurer
- our professional advisers
- your employer
- other service providers that provide services or products relevant to your NGS Super account
- any relevant government authority that requires your personal information to be disclosed.

In managing your super your personal information may be disclosed to service providers in another country, most likely to Mercer's processing centre in India. Our Privacy Policy lists any other relevant offshore locations.

Our **Privacy Policy** sets out in more detail

- how we deal with your personal information
- how to access and seek correction of the information we hold about you
- how you may lodge a complaint if we breach an Australian Privacy Principle
- how we will handle any complaint.

You can view our Privacy Policy at

**[www.ngssuper.com.au/privacy-policy](http://www.ngssuper.com.au/privacy-policy)** or obtain a copy by contacting us on **1300 133 177**.

If you have any other queries in relation to privacy issues, or if you do not wish to receive marketing material, you may contact us on **1300 133 177**. You may also write to the NGS Super Privacy Officer at PO Box 21236 World Square NSW 2002 or online at **[www.ngssuper.com.au/contact-us](http://www.ngssuper.com.au/contact-us)**.

## If you are not a member of NGS Super, and you are not applying for membership

We will use your personal information only to enable us to take action on the particular matter you have contacted us about. In most instances we will not need to collect any further personal information from any other source. We will disclose your personal information only to those organisations mentioned above as are necessary to take action on the matter in question or for the management of the Fund generally.