

Pension Reversionary Beneficiary Payment Form

Complete this form if you're the reversionary beneficiary of a LUCRF Super member.

Step 1 LUCRF Super member details

Please read our Personal Information Collection Statement at lucrf.com.au/privacy.

LUCRF Super member number (please contact us if you don't know the member number)

Date of birth (dd/mm/yyyy)

Mr Mrs Miss Ms Other (please specify)

First name(s)

Last name

Step 2 Beneficiary details

Mr Mrs Miss Ms Other (please specify) Date of birth (dd/mm/yyyy)

First name(s)

Last name

Residential/Street address

Unit/Street number

Street name

Suburb/City/Town

State/Territory Postcode

Postal address - if different to residential

Unit/Street/PO Box number

Street name

Suburb/City/Town

State/Territory Postcode

Step 3 Tax file number (TFN)

If the benefit payable to you is to be taxed, please supply your TFN. LUCRF Super is authorised under legislation to collect your TFN. Where provided it will be kept confidential and used only for lawful purposes (which may change in the future).

I am aware I do not have to provide my TFN, but by providing it I understand LUCRF Super will only use it for legal purposes.

If it is not provided, I understand tax may be paid at a higher rate.

I choose to provide my TFN and declare that it is:



143.01

Issued September 2017 by L.U.C.R.F Pty Ltd ABN 18 005 502 090 AFSL 258481 as Trustee for Labour Union Co-operative Retirement Fund (LUCRF Super) ABN 26 382 680 883.

Payment drawdown schedule

The government requires that you receive a minimum percentage of the pension account balance each year. This is called the minimum drawdown.

If you start receiving regular payments part-way through a financial year, the applicable minimum payment limit will be determined on a pro-rata basis. This means that the percentage amount payable will be calculated in proportion to the number of remaining days in a financial year.

See the table on the right for the current minimum drawdown limits.

Pension drawdown amounts	
Age	Standard minimum
Under 65	4%
65 to 74	5%
75 to 79	6%
80 to 84	7%
85 to 89	9%
90 to 94	11%
95 or over	14%

Note: the percentage refers to that proportion of your benefit on joining us and at 30 June each year thereafter.

Step 4 Select payment amount/percentage and frequency

If you'd like to find out how much has already been received in the current financial year, please call us on **1300 130 780**. Your drawdown payment arrangement will commence from the next payment date after this form is received.

I'd like the payment amount/percentage to be (please choose only one option below):

- The minimum amount of the account balance allowed under government legislation (see our Pension Member Guide)
- A percentage amount of the account balance: % per annum (based upon 12-month payment period)*
- A nominated amount of the account balance: \$.00 per payment frequency*, OR
- A full lump sum payment.

Payment frequency Nominate how often you'd like to receive your pension payments (cross [X] one option only).

Payment frequency	
<input type="checkbox"/> Weekly (Paid every Thursday)	<input type="checkbox"/> Twice yearly (Paid on the 28 th of June and December)
<input type="checkbox"/> Twice monthly (Paid on the 14 th and 28 th of each month)	<input type="checkbox"/> Yearly Please nominate your first payment date. Your payment will then be made on the same date and month each following year. <input type="checkbox"/> 14 th or <input type="checkbox"/> 28 th day of <input type="text"/> (month) of <input type="text"/> (year)
<input type="checkbox"/> Monthly (Paid on the 28 th of each month)	
<input type="checkbox"/> Quarterly (Paid on the 28 th of March, June, September and December)	

Step 5 Payment account details (requires proof of identification – see page 3)

Nominate the account you'd like payments to be made into. Please note that we are not responsible for any loss arising from an error you make in providing this information.

BSB number — Account number Account name

Bank name

Bank address

Step 6 Sign and date this form

- I confirm that all of the details provided in this form are accurate and complete.
- I understand that any document details I provide as evidence of my identity may be checked with the relevant government agency via the Document Verification Service (more information can be found at dvs.gov.au).

Signature

Date (dd/mm/yyyy)

Further information Proof of identification

To make any changes to pension payments, you'll need to provide a certified copy of proof of identification.

What is a certified document?

It's a 'true copy' of an original document, sighted and signed by an authorised individual.

Who can certify a document?

Only certain individuals are authorised to certify copies of original documents. These include:

- a pharmacist
- a registered medical practitioner
- a police officer
- a Justice of the Peace
- a permanent employee of Australia Post with two or more years of continuous service, and
- an officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL) with two or more years of continuous service.

The individual must view both the original and the copy to make sure that both documents are identical. They must then write or stamp 'certified true copy' on each of the pages, followed by their signature, printed name, qualifications and date.

What certified documents are accepted?

Accepted documents include the following:

1. One of these government-issued photographic ID documents:
 - current Australian driver licence
 - Australian passport (current or that hasn't been expired for more than two years)
 - current foreign passport
 - other current Australian government-issued photographic ID (such as a proof of age card or Australian tertiary institution student card).

OR

2. One of these government-issued non-photographic ID documents:

- birth certificate or birth extract
- citizenship certificate
- current foreign driver licence
- current Centrelink pension card.

And one of these documents showing your address:

- utility bill (less than 3 months old)
- local government rates notice (less than 3 months old)
- government benefits notice (less than 12 months old)
- tax assessment notice (less than 12 months old).

Checklist

Before you send this form to us, make sure you have:

- provided your payment details in Step 5
- provided a certified copy of identification
- signed and dated this form.

If you need any help completing this form, please call us on 1300 130 780 or email mypartner@lucrf.com.au.

Send this form and your supporting documents to:

LUCRF Super
PO Box 211
North Melbourne VIC 3051
mypartner@lucrf.com.au