

Pension Change to Payment Form



Complete this form to change your pension payments.

Step 1 Your details

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

We recommend you share a copy of our Privacy Policy with any nominated beneficiaries and inform them that we'll be collecting and using their full name and residential address.

LUCRF Pension member number (please contact us if you don't know your member number)

Date of birth (dd/mm/yyyy)

 / /

Please tick the appropriate box: Mr Mrs Miss Ms

Other (please specify)

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

Contact details

Email address

Mobile phone

Work phone

Home phone

Payment drawdown schedule

You must withdraw a minimum percentage each year of your transition to retirement (TTR) or retirement pension account balance, as set out in the table below. If you have a TTR pension and you're under 65, you cannot withdraw more than 10% of your account balance each year. Please refer to the table before completing Step 2.

Age	Standard minimum drawdown
Below 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%

Refer to the age band appropriate to your age at 1 July in the current financial year (or the date you started your LUCRF Pension if after this date).

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



109.61

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Step 2 Change payment amount/percentage and frequency

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

I want to change my payment to (please choose only one option from the following):

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

*You cannot withdraw more than 10% of your TTR pension account balance per year. There is no maximum withdrawal limit for retirement pensions.

Payment frequency Nominate how often you'd like to receive your pension payments tick 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 3 Change payment account (requires supporting documentation – see below)

If you'd like to change the account your payments are made into, complete this section. Please note that we are not responsible for any loss arising from an error you make in providing this information.

I wish to change my bank account details as provided below I do not wish to change my bank account details

BSB number — Account number Account name

Bank name

Bank address

You must send us a copy of a recent bank statement as well as proof of identification (see page 3) with this form so we can confirm your details.

Step 4 Changing your account from a TTR Pension to a Retirement Pension

If you'd like to change your pension account from a TTR pension to a retirement pension, please tick one of the options below that applies to your situation:

I have fully retired from work Date of retirement (dd/mm/yyyy) / /

OR

I am between 60 to 64 and have ceased a gainful employment arrangement since turning 60

Date of ceasing a gainful employment arrangement (dd/mm/yyyy) / /

Step 5 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)

		/			/				
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Further information Proof of identification

To make any changes to your pension payment, 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 has not 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).

For further details on providing proof of identification, including what to do if you've changed your name or you're currently overseas, call us on **1300 130 780** or refer to our 'How to provide proof of identification' fact sheet available on our website.

Checklist

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

- indicated the changes you would like to make to your pension payments
- provided a certified copy of identification and a copy of a recent bank statement (if required)
- signed and dated this form.

Send this form and your supporting documents to:

LUCRF Super
PO Box 211
North Melbourne VIC 3051

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