



## SECTION 2 – PROOF OF IDENTITY

The government has introduced legislation that requires us to obtain proof of your identity before we can transfer money from your other fund account(s).

See the **'Completing proof of identity'** information in Section 9 for details of the government's identity requirements.

a.  I have attached a certified copy of my driver's licence or passport

**OR**

b.  I have attached certified copies of both:  Birth/Citizenship Certificate or Centrelink Pension Card **AND**  
 Centrelink payment letter or Government or local council notice (less than 1 year old) with name and address

## SECTION 3 – TAX FILE NUMBER (TFN)

If you are under age 60 we recommend that you provide us with your TFN. If you do not provide us with your TFN we will be required by law to deduct PAYG tax at the top marginal tax rate from your income stream payments.

Super funds are required and authorised to ask you for your TFN under the *Superannuation Industry (Supervision) Act 1993*. Declining to quote your TFN is not an offence. However if you do not quote it, or do not tell us if you are exempt from quoting it, we will not be able to accept voluntary contributions from you and will be required to deduct tax at the highest marginal rate plus Medicare Levy from all benefits paid to you.

The Australian Taxation Office may also apply other taxes to your account, such as the Superannuation Contributions Tax, regardless of your income.

Under the *Superannuation Industry (Supervision) Act 1993*, the Trustee is also allowed to use your TFN if paying out monies, identifying and amalgamating superannuation benefits, for surcharge purposes and for other approved purposes. The approved purposes and the consequences of not quoting a TFN may change in the future. Your TFN will also be passed to another superannuation provider if your benefits are being transferred (unless you inform us in writing not to pass on your TFN).

Do you agree to provide your TFN for approved purposes?  Yes  No

If you agree, please provide your TFN here:

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## SECTION 4 – INITIAL INVESTMENT AMOUNT

Your initial investment amount can come from two sources:

1. Super monies held with an external super fund (rollovers); and/or
2. Your existing balance in your Prime Super account.

### Rollovers

If you wish to **rollover** monies held in an external fund, you will need to complete a separate *Prime Super Retirement income streams – Rollover your super form* for each rollover.

To provide us with an indication of the amount we can expect to receive into your account via a rollover, please complete the details below:

Name of paying fund	Approx. amount of rollover
1.	\$
2.	\$
3.	\$
4.	\$
5.	\$
TOTAL	\$

### Existing balance

If you wish to transfer the **existing balance** in your Prime Super account into a Retirement income stream account, please complete the details below.

Full balance transfer (which includes your existing balance plus the details above)

**OR**

Other amount \$ 

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**The minimum net total investment amount is \$10,000.**





## SECTION 7 – ESTATE PLANNING

See Section 9 for further details on reversionary and preferred beneficiaries and read the *Prime Super Short-Form PDS – Retirement income streams* and the *Prime Super's retirement* options brochure for full details on Prime Super's estate planning options.

### REVERSIONARY BENEFICIARY

You can decide what happens to the remainder of your money by nominating a **reversionary beneficiary**.

If you die while invested in either income stream product, the money remaining in your account is not lost.

If you nominate a reversionary beneficiary, they will *automatically* continue to be paid from your income stream when you die, or alternatively, they may choose to withdraw your remaining balance as a lump sum.

If you die *without* nominating a reversionary beneficiary or if the person you nominate as a reversionary beneficiary does not qualify to receive payments under the law at the time you die, the Trustee will pay the balance of your account to either your preferred beneficiaries (see below), your estate or as directed or permitted by the relevant law at the time. Please note: you can only nominate one reversionary beneficiary.

**DO YOU WISH TO NOMINATE A REVERSIONARY BENEFICIARY?** (Please tick one)  YES  NO

Member Number (If a Prime Super member)

Date of Birth (DDMMYYYY)

Surname

Title

 Mr  Mrs  Miss  Ms  Dr

Given Names

Gender

 Male  Female

Residential Address



Suburb/City/Town

State

Postcode

Phone Number (BH)

Phone Number (AH)

Mobile Number

Email (UPPER and lower case where applicable)

### PREFERRED BENEFICIARIES

If you have not nominated a reversionary beneficiary and/or you would like to nominate additional beneficiaries to receive your benefit in the event of your death, please complete the section below.

You may wish to nominate beneficiaries to receive the balance of your income stream account as a lump sum, should you die while a member of Prime Super. Please note that if you have nominated a reversionary beneficiary, they will receive the benefit in your income stream account. Preferred beneficiaries will only be paid if there is no reversionary beneficiary or the reversionary beneficiary has died. Please refer to the *Short-Form PDS – Retirement income streams* for further information.

**Having read the *Short-Form PDS*, I wish to nominate the following preferred beneficiaries to receive the balance of my income stream account should I die and there is no reversionary beneficiary eligible to receive my benefit subject to the relevant law at the time of my death.**

1 Full name

Address

Suburb/City/Town

State

Postcode

Type of Dependant (see Section 9)

Phone Number (BH)

Phone Number (AH)

Mobile Number

Date of Birth (DDMMYYYY)

% of benefit

.00%




## SECTION 9 – ADDITIONAL INFORMATION

### COMPLETING PROOF OF IDENTITY

You will need to provide documentation with this request to prove you are the person to whom the superannuation entitlements belong.

#### Acceptable documents

The following documents may be used.

EITHER	OR	AND	
<p><b>One of the following documents only:</b></p> <ul style="list-style-type: none"> <li>• driver's licence issued under State or Territory law</li> <li>• passport</li> </ul>	<p><b>One of the following documents:</b></p> <ul style="list-style-type: none"> <li>• birth certificate or birth extract</li> <li>• citizenship certificate issued by the Commonwealth</li> <li>• pension card issued by Centrelink that entitles the person to financial benefits</li> </ul>		<p><b>One of the following documents:</b></p> <ul style="list-style-type: none"> <li>• letter from Centrelink regarding a Government assistance payment</li> <li>• notice issued by Commonwealth, State or Territory Government within the past twelve months or local council within the past 3 months that contains your name and residential address.</li> </ul> <p>For example:</p> <ul style="list-style-type: none"> <li>– Tax Office Notice of Assessment</li> <li>– Rates notice from local council</li> </ul>

#### Have you changed your name or are you signing on behalf of another person?

If you have changed your name or are signing on behalf of the applicant, you will need to provide a certified linking document. A linking document is a document that proves a relationship between two (or more) names.

The following table contains information about suitable linking documents.

Purpose	Suitable linking documents
Change of name	Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office.
Signed on behalf of the applicant	Guardianship papers or Power of Attorney

#### Certification of personal documents

All copied pages of ORIGINAL proof of identification documents (including any linking documents) need to be certified as true copies by any individual approved to do so (see below).

The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (eg Justice of the Peace, Australia Post employee, etc) and date.

The following persons can certify copies of the original as **true and correct** copies. This is not a complete list. For a full list of individuals who can certify documents, go to the Prime Super website at [www.primesuper.com.au](http://www.primesuper.com.au):

- a Prime Super Regional Manager (RM);
- a permanent employee of Australia Post with 2 or more years of continuous service;
- a finance company officer with 2 or more years of continuous service (with one or more finance companies);
- an officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having 2 or more years continuous service with one or more licensees;
- a notary public officer;
- a police officer;
- a registrar or deputy registrar of a court;
- a Justice of the Peace;
- a person enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia, as a legal practitioner;
- an Australian consular officer or an Australian diplomatic officer;
- a judge of a court;
- a magistrate; or
- a Chief Executive Officer of a Commonwealth court.

#### A REVERSIONARY BENEFICIARY

A reversionary beneficiary must be:

- your spouse (including de facto);
- a child (including a step-child) who is:
  - under 16;
  - between 16 and 24 (inclusive) and financially dependent; or
  - has a disability; or
- another person who is cared for by you or financially dependent on you when you die, where permitted by law.

A reversionary beneficiary has much the same rights as the original beneficiary. Amongst other things they can:

- commute their income stream and be paid a lump sum;
- set their own level of payment within the limits imposed by regulation; and
- set their own investment strategy.



However, rules relating to reversionary beneficiaries can change over time and reversionary beneficiaries should seek information and advice on their rights. Generally, where a person receiving a TTR income stream dies, the reversionary beneficiary will receive an allocated income stream in its place.

Should a reversionary beneficiary die before the account is empty, the balance will pass:

- as an allocated income stream to one or more reversionary beneficiaries that they nominate;
- as a lump sum to their estate; or
- as directed or permitted by the relevant law at the time.

You can nominate a reversionary beneficiary when you complete the application form to join either income stream or you can do it after you join. You can also change your nomination by advising us in writing (you can download a *Retirement income streams – Nomination of beneficiaries form* from our website) at any time.

## PREFERRED BENEFICIARIES

Any beneficiary you nominate must be either your legal personal representative (i.e. the executor or administrator of your estate) or dependant at the date of your death.

If you nominate your estate or legal personal representative, your benefit will be paid according to your Will (or according to the law of your state or territory if you have no Will).

In terms of Superannuation Law, the people (dependants) that you are able to nominate to receive your Death benefit are:

- your spouse (including de facto of the same or different sex);
- your children (including biological, step and adopted children, or a child of your spouse);
- any person who is financially dependant on you;
- any person with whom you have an interdependency relationship including:
  - any person with whom you have a close personal relationship and live with where, one or both of you also provides ongoing financial support, domestic support and personal care; and
  - any person with whom you have a close personal relationship where, because of a disability, the above requirements of living together, financial support, domestic support and personal care are not able to be satisfied.

## WHERE TO SEND THIS FORM

Once completed please return this form to us via mail, fax or email.

**Mail** Prime Super  
Locked Bag 5103  
Parramatta NSW 2124

**Freecall** 1800 675 839  
**Fax** 1800 023 662  
**Email** [administration@primesuper.com.au](mailto:administration@primesuper.com.au)

If you have any questions about this form or Prime Super please call us on **1800 675 839** (8.00am to 8.00pm Monday-Friday Sydney time).

