

CONNECT Pension Application Form

Please answer all questions. An incomplete form will be returned to you and your application could be delayed.
Please use BLOCK letters and black ink when completing this form. This request will be invalid if unsigned by the member.

1. Personal Details

Title Given Name(s)

Surname/Family Name Date of Birth Sex

Residential Address

Number Street Name

Suburb State Postcode

Postal Address (if different from residential address)

Number Street Name

PO Box

Suburb State Postcode

Contact Telephone (Please include area code)

Mobile Phone

E-mail

Tax File Number

A **Tax File Number Declaration Form** must be completed for each pension account opened. While you do not have to provide your TFN by law, CONNECT is unable to accept your application without a completed Declaration Form.

2. Funding Your Pension

Please provide details of all superannuation money that will fund your CONNECT pension. Where money is being rolled over from your other superannuation funds please complete a **Request to Rollover Superannuation Benefits into CONNECT form** for each rollover. A form is included in the Pension PDS.

If you require more forms please download from www.connectsuper.com.au or call us on 1800 334 287.

1. Transfer from your CONNECT account

Full Transfer Partial Transfer* \$

* Note: If you want to keep your CONNECT account open, a minimum of \$1,500 must remain in your CONNECT account. If you request a partial transfer of more than that, your balance, minus \$1,500, will be transferred to your pension account.

Other Superannuation Sources

<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>

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3. Your Pension Details

Pension Type Tick the box for the type of pension you would like to nominate.

Account Based Transition to Retirement

Pension Amount Please refer to pages 10 and 11 of the Pension PDS on how to calculate your minimum and maximum pension payment.

Your Nominated Pension must be between the minimum and maximum applicable to your age and type of pension.

Select one of the following

Minimum Pension Maximum Pension* Nominated Pension \$ Per monthly payment

*Maximum pension payments are applicable to Transition to Retirement pensions only.

Your nominated amount is gross of tax. Your net payment will depend on your age and personal tax rate. See page 21 of the PDS for more taxation information.

4. Banking Details

Please provide the details of the bank, building society or credit union account you would like your pension payments to be made into.

Account Name (must be in your name or a joint account with you and another person)

Bank/Building Society/Credit Union Name

BSB

Account Number

5. Your Beneficiaries

Reversionary Beneficiary

You can nominate one reversionary beneficiary who will continue to receive your pension payments upon your death. A nominated reversionary beneficiary can only be a spouse, a dependent child under the age of 18, or a financially dependent child between the ages of 18 and 25, or another wholly or partially financial dependant, or a person who has an "interdependent relationship" with you. Please see page 13 of the Pension PDS for more information.

Title

Surname/Family Name

Given Name(s)

Relationship (e.g. Wife, Son, etc.)

Date of Birth (Please provide certified proof)

Residential Address

Number

Street Name

Suburb

State

Postcode

Lump Sum Beneficiary

A lump sum beneficiary is an alternative option to nominating a reversionary beneficiary. You can nominate one or more beneficiaries that you wish to be considered for payment of your entitlements in the event of your death. Please see page 13 of the Pension PDS for more information on eligibility. The CONNECT Trustee will take into account your nomination when deciding who should receive your benefit. However, the nomination of preferred beneficiaries is not binding on CONNECT and does not in any way affect or restrict any authority, power or discretion vested in the CONNECT Trustee to pay the benefit. There is no limit to the number of beneficiaries you may nominate. If there is insufficient space please write the details on a separate piece of paper, sign and date it, and submit with this form.

Name of Beneficiary

Relationship (e.g. Wife, Son, etc.)

Portion of Benefit %

Name of Beneficiary

Relationship (e.g. Wife, Son, etc.)

Portion of Benefit %

Name of Beneficiary

Relationship (e.g. Wife, Son, etc.)

Portion of Benefit %

If you wish to nominate additional beneficiaries, please list them on a separate piece of paper and attach it to your application form.

6. Your Investment Choices

Please refer to pages 14 to 17 of the Pension PDS before making a selection. If you do not make a choice or your choices do not add up to 100% the Trustee will apply the Balanced option as the default.

Whole numbers only

CAPITAL STABLE

Minimum risk and lower returns for a protected investment.

 %

HIGH GROWTH

Higher risk for higher returns over the long-term.

 %

BALANCED

Balanced risk for higher returns over the medium to long-term.

 %

 %

Note: if you have selected more than one investment option above, please choose one of the following options:

- I request my pension payments and other transactions be paid proportionately from the investment options selected above. **OR** I request my pension payments and other transactions be paid from the following investment option(s):

Whole numbers only

CAPITAL STABLE

Minimum risk and lower returns for a protected investment.

 %

HIGH GROWTH

Higher risk for higher returns over the long-term.

 %

BALANCED

Balanced risk for higher returns over the medium to long-term.

 %

 %

- I understand that I can change my investment choice at no charge twice in any one 12 month period.
- I understand that changing my investment choice at other times incurs a \$25 fee, deducted from my CONNECT account.

If your selected investment options for payment runs out, future payments will default proportionately across your remaining investment options.

8. Proof of Identity

Please tick the box/es to show which documents you have attached to this form.

You will need to provide a certified copy of ONE of the following documents that contains your photograph:

- A current drivers licence or permit issued under the law of a State or Territory; or
- A passport issued by the Commonwealth which can be up to two years out of date

If you are unable to provide either of the above documents, then you will need to provide ONE of the following documents:

- Birth certificate or birth extract, or
- Citizenship certificate issued by the Commonwealth, or
- Pension card issued by Centrelink that entitles you to financial benefits

AND one of the following documents:

- Notice issued by Commonwealth, State or Territory Government within the past 12 months, containing your name and residential address, recording the provision of financial benefits (Not applicable if you are also providing a pension card), or
- Notice issued by the Australian Taxation Office within the past 12 months that contains your name and residential address, or
- Notice issued by a local council or utilities provider within the past 3 months that contains your name and residential address.

If you are unable to provide accepted certified documents, please contact CONNECT for other options.

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 makes sure both documents are identical, then make sure that all pages have been certified as true copies by writing or stamping "certified true copy" followed by their signature, printed name, qualification (e.g. Justice of the Peace) and date. The following people can certify copies of the originals as true and correct copies:

- A person under a law in force in a State or Territory, currently licensed or registered to practice an occupation listed in Part 1 of Schedule 2 of the Statutory Declaration Regulations 1993;
- A person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner;
- A person listed in Part 2 of Schedule 2 of the Statutory Declaration Regulations 1993;
- An officer with, or authorised representative of, a holder of an Australian Financial Services Licence, having 2 or more continuous years of service with one or more licensees.

9. Agreement and Declaration

I hereby declare that:

- I am applying for a CONNECT pension and confirm that I have received and read the CONNECT Product Disclosure Statement and agree to be bound by the CONNECT Trust Deed;
- I understand that CONNECT may deduct taxation from regular pension payments and any lump sum payments based on the information I have provided;
- I understand that pension payments will normally be paid into my nominated bank account around the 15th day of each month, or less frequently if advised by me;
- I understand that any pension payments made subsequent to an authorisation give by me will

continue until a subsequent authorisation or until advice of my death has been provided;

- I understand that I have 14 days from the date of confirmation of my membership to withdraw my application (cooling off period), subject to superannuation law. In any case, I may withdraw my entire balance from the CONNECT pension at any time;
- I consent to my personal information being collected and used in accordance with CONNECT's privacy policy.
- I understand that the Trustee has not provided advice as to the appropriateness of this product or any particular investment option(s) that I have selected which is based on my personal objectives, financial situation or needs.

- Neither CONNECT, nor any of the fund managers, nor their member companies, nor any associated trustees guarantee the repayment of capital or the performance of any investment option.
- I have read and carefully considered all questions, and that the answers that I have provided are all true and correct.

When your details are provided to CONNECT they are securely stored and accessible only by authorised personnel for the purpose of maintaining your account. CONNECT will not use your personal information for any other purpose or pass it on to any other organisation without your express permission. By signing this form, you are agreeing to the handling of your personal information. If you wish to review our Privacy Statement, please contact us on 1800 025 464.

Signature

Date:

Please return this completed form to: **CONNECT, Locked Bag 3410, Melbourne VIC 3001**
For assistance call CONNECT on 1800 025 464 (Free Call)