

For name changes, a certified copy of the original documents will need to be provided. Please refer to the 'Completing Proof of Identity' document on www.ioof.com.au for a list of persons authorised to certify copies of original documents.

Signature of client/ Power of Attorney or Guardian		Date	
Previous signature (where name has changed)		Date	

Section 3: Change of residential address and other details

For a fast and convenient way to change your residential address simply log into IOOF Online (www.ioofonline.com.au) and enter your user ID and password. If you have not registered for IOOF Online, please click on the 'not registered?' link and follow the instructions to gain access.

Alternatively, please contact ClientFirst on 1800 913 118. Please note that you will need to satisfy an identification check of the mandatory fields in Section 1, to change your details.

If you are unable to change your residential address using the above two methods please complete the details below. When completing this section, please ensure Section 1 has been completed.

If you are residing overseas you must complete and submit the below forms. If you are updating your country of residence we may also request an original certified copy of your identification. For more information on acceptable ID and a list of certifiers refer to the Proof of Identity Guide on ioof.com.au.

- an Overseas Investor form (www.ioof.com.au)
- Original certified copies of your identification documents

Address			
Suburb		State	
		Postcode	
Phone (home)		Phone (work)	
Mobile			
Email			

Section 4: Change of postal address

Is your postal address the same as your residential address provided above? Yes No

Postal address if different from the residential address above:

Address			
Suburb		State	
		Postcode	
Phone (home)		Phone (work)	

Section 5: Change to Pension payments (IOOF Pension only)

A. Please change my pension payment to:

Frequency

Fortnightly
 Monthly
 Quarterly
 Half-yearly
 Yearly

Pension payments will be made on the first day and date available after the pension has been established.

I would like to select a specified start date.

Date

Please note:

- If this request is not processed in time to meet this date, we'll use the next available date to process your pension payment.
- We may process your pension payment earlier than the specified date, to ensure it reaches your nominated financial institution on time.
- If the selected payment date is unavailable for any month, we'll aim to make the payment on the nearest available business day prior to that date.
- There may be delays in early July as we recalculate pensions for the new financial year.

B. Please select the level of annual pension required:

Select the level of annual pension required.

Minimum¹

Maximum (TTR & TAP only). Please confirm amount: Full maximum **OR** Pro-rata maximum

Fixed calculated amount (TAP only)

A Nominated amount \$ per annum **OR** \$ per payment² Net Gross

Annual increase³

Indexation rate % or CPI

Please note: We require five business days to action your request. If we have not received your request in time to alter your next scheduled payment, please be assured your alteration will take effect from the following payment.

You can specify a nominated amount you'd like paid; however, this must be within the required minimums and maximum (if applicable) limits. If you nominate an amount outside these limits, we will adjust this amount to the minimum or maximum. For more information on these limits, please refer to the offer document for your product on www.ioof.com.au/privacy.

- 1 If you commence your pension other than on 1 July, the minimum amount selected will be pro-rated.
- 2 This is a whole payment amount.
- 3 Annual increases are only applicable where you have selected a nominated amount.

If you are receiving pension payments and your bank details have changed, please complete the details below:

Name of financial institution

Account name

BSB

-

Account number

I want to update my nominated financial institution with the above details for all future withdrawals & pension payments.

Please note:

- Ensure your account details are correct as we will not be liable for mistaken payments based on incorrect details.
- The nominated account must be in your own name or in one jointly owned by you.

Section 6: Member declaration

Important note: The Trustee collects the information in this form for the purpose of updating the information it holds about you. Any personal information provided in this form will be handled in accordance with the privacy policy at www.ioof.com.au/privacy. If you do not provide all of the requested information, we may not be able to action your request.

- I consent to the collection and use of the above information by the Trustee for the purposes specified.
- I authorise the above changes to be made to my account details
- I declare that the details given in this form are true and correct.

Signature of member/Power
of Attorney or Guardian

Date

Please forward all correspondence and enquiries to

Post GPO Box 264, Melbourne VIC 3001

Email clientfirst@ioof.com.au

Telephone 1800 913 118

Web www.ioof.com.au