



30 November 2019

Change of Details

- IOOF Personal Super
- IOOF Employer Super
- IOOF Pension

Note: If you wish to update your address to an overseas address, renew or change your binding death nomination, change your investment strategy, insurance or direct debit instructions, please use the appropriate form available from our website. For further information please contact ClientFirst or your Financial adviser.

Please complete these instructions in **BLACK INK** using **CAPITAL LETTERS** (except for your email address) and **✓** boxes where provided.

Step 1: Member details

Member type	<input type="checkbox"/> Employer	<input type="checkbox"/> Personal	<input type="checkbox"/> Pension	Account number*	<input type="text"/>
Title (Dr/Mr/Mrs/Ms/Miss)	<input type="text"/>	Surname*	<input type="text"/>		
Given name(s)*	<input type="text"/>				
Date of birth*	<input type="text"/> / <input type="text"/> / <input type="text"/>	Tax File Number	<input type="text"/> - <input type="text"/> - <input type="text"/>		
Email	<input type="text"/>				
Employer name (if applicable)	<input type="text"/>				

* Indicates a mandatory field. If you do not complete all of the mandatory fields, there may be a delay in processing your request.

If you are residing overseas you must complete and submit

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

Step 2: Change of name

Only complete this section if your name has changed.

We require supporting documentation to action your request.

New name

Title (Dr/Mr/Mrs/Ms/Miss)	<input type="text"/>	Surname	<input type="text"/>
Given name(s)	<input type="text"/>		

Please enclose one of the following proof of change of name documents (please tick appropriate box(es)):

- A **certified** copy of your marriage certificate
- A **certified** copy of your change of name certificate
- A **certified** copy of your marriage certificate and Decree Nisi (Divorce Papers)

And one of the following primary identification documents issued in your new name:

- A **certified** copy of your driver's licence issued under State or Territory law
- A **certified** copy of your passport

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.

Step 3: Change of residential address and other details

Note: you cannot update your address to an overseas address using this form. Please complete the 'Overseas Investor Form' available under 'AML forms' on our website.

For a fast and convenient way to change your residential address simply log into IOOF Online (www.ioofonline.com.au/public/login) 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 Step 1, to change your details.

If you are unable to change your residential address using the above two methods please complete the details below.

Address	<input type="text"/>														
Suburb	<input type="text"/>					State	<input type="text"/>	Postcode	<input type="text"/>						
Phone (home)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Phone (work)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>					
Mobile	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>					
Email	<input type="text"/>														

Step 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	<input type="text"/>														
Suburb	<input type="text"/>					State	<input type="text"/>	Postcode	<input type="text"/>						
Phone (home)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Phone (work)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>					

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

Please change my pension payment to:

Frequency Fortnightly (every second Tuesday) Monthly (7th of every month) Quarterly Half-yearly Yearly

Pension amount

Minimum

OR

Maximum limit*

OR

Nominated amount \$ per annum Indexation rate %

OR

Nominated amount \$ per frequency Net Gross Indexation rate %

* Transition to retirement pension only.

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.

Step 6a): Financial institution details for regular pension payments*

If your Financial institution details for regular pension payments have changed, please complete the details below:

Name of financial institution

Branch

Account name

BSB - Account number

Step 6b): Financial institution details for ad hoc withdrawals*

Financial institution

Branch

Account name

BSB - Account number

* Please ensure your account details are correct as we will not be liable for mistaken payments based upon incorrect details. Please note that the account must be held either solely or jointly in your name.

Step 7: Change of adviser

Licensee name

Adviser surname

Adviser given name(s)

Phone Facsimile

AFS license number

Step 8: Member advice fees

If you are a MySuper member you are unable to select the Member Advice Fee – Upfront in Step 8.

Choose your fee option. Fees should be provided including GST. Where the default fee is not selected, all boxes for the relevant fee option must be completed. Blank boxes will default to nil.

- The default value for each member advice fee is 0% or \$0, unless you agree and specify otherwise below in conjunction with your financial adviser.
- Member advice fees can only be deducted from your super/pension account if they relate to advice you receive about your super/ pension benefits, insurance and investments.
- Where you agree to a member advice fee, please ensure you sign the 'Member advice fees' declaration in this section .
- The member advice fee(s) paid to your financial adviser and their Licensee (and quoted in this section) are inclusive of GST.
- The actual amount deducted from your account may be less than the amount quoted. This is because the Fund may be able to claim a reduced input tax credit (RITC) on some of these fees. Where the Fund is able to claim an RITC, the benefit is passed on to you which effectively reduces the fee. Note that the RITC rules are subject to change and this may impact the RITC available in the future.

For IOOF Employer Super, if a member advice fee is selected, no other commissions or Adviser Service fee will apply.

(1) Member Advice Fee – Upfront

Up to a maximum of 5.5% of each contribution.

Contributions	<input type="text"/>	% (inclusive of GST)
Transfers/rollovers (not applicable to transfers from existing accounts within IOOF)	<input type="text"/>	% (inclusive of GST)

(2) Member Advice Fee – Ongoing

Up to a maximum of 2.2% pa of your account balance.

Percentage fee	<input type="text"/>	% pa (inclusive of GST)
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AND/OR

Up to a maximum of \$18,000 pa.

Flat fee (dollar amount)	\$ <input type="text"/>	pa (inclusive of GST)
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(3) Member Advice Fee – Insurance (IOOF Employer Super and IOOF Personal Super only)

Up to a maximum of 50% pa of each insurance premium.

<input type="checkbox"/> Percentage fee	Primary: Death or Death and TPD cover	<input type="text"/>	% pa (inclusive of GST)
	Additional: Death or Death and TPD cover	<input type="text"/>	% pa (inclusive of GST)
	Income protection cover	<input type="text"/>	% pa (inclusive of GST)

OR

Up to a maximum of \$18,000 pa.

<input type="checkbox"/> Flat fee (dollar amount)	\$ <input type="text"/>	pa (inclusive of GST)
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Notes:

- Maximum fees above include GST.
- For further information on member advice fees, please refer to the PDS.

Member advice fees (if applicable)

- I authorise the Trustee to charge the member advice fee(s) selected in Step 8 against my account.
- The amount of any member advice fee(s) that are paid to my financial adviser, as agreed by me, will be an additional cost to me and charged against my account. A member advice fee will not be charged unless I tell the Trustee to do so.
- Any agreed member advice fee(s) will be charged to my account and paid in full to the financial adviser, until I instruct the Trustee to cease payment.

Member Signature

Date / /

Adviser name

Licensee name

Contact name

AFS license number

Adviser code

Dealer code

Adviser signature

Date / / **Step 9: 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 member details.
- I authorise provision of information regarding my membership and the payment of adviser remuneration to the above adviser (where a new adviser has been nominated).
- I consent to the alteration of my current fee structure, where applicable, as noted in Step 8 of this form.

Signature of member/Power
of Attorney or Guardian
Date / / Previous signature
(where name has changed)
Date / / **Note:**

If this form is signed under Power of Attorney, the Attorney declares that they have not received notice of revocation of that power (a certified copy of the Power of Attorney should be submitted with this form unless we have already received it).

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