

15 June 2021

## Change of Details

### eXpand Super | eXpand Pension

Please use this form for change of member details, name, residential address and other details, postal address, financial institution details for payments and adviser details.

If you wish to renew or change your advice fees, nomination of beneficiaries, investment strategy, direct debit details, or insurance, please complete the relevant form available from your financial adviser, from our website or by contacting ClientFirst (where applicable).

Please complete these instructions in BLACK INK using CAPITAL LETTERS and ✓ boxes where provided.

### Section 1: Member details

Account type	<input type="checkbox"/> Super	<input type="checkbox"/> Pension	Account number*	<input type="text"/>
Title (Dr/Mr/Mrs/Ms/Miss)	<input type="text"/>	Surname*	<input type="text"/>	<input type="text"/>
Given name(s)*	<input type="text"/>			
Date of birth*	<input type="text"/>	/	<input type="text"/>	/
Email	<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.

### Section 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)):

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

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

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

For name changes, an original certified copy of the original documents will need to be provided. Please refer to the 'Completing Proof of Identity' document on [www.myexpand.com.au](http://www.myexpand.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 eXpand Online and enter your user ID and password. If you have not registered for eXpand Online, please click on the 'Register for access' link and follow the instructions to gain access.

Alternatively, please contact ClientFirst on 1800 517 124. 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 methods please complete the details below.

If you are residing overseas you must complete and submit

- an Overseas Investor form ([www.myexpand.com.au](http://www.myexpand.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 in Step 3?  Yes  No

Please provide postal address if different from the residential address in Step 3.

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

### Section 5: Add or change financial institution details for pension payments

Financial institution											
Branch											
Account name											
BSB							Account number				

Please note that the account must be held either solely or jointly in your name.

## Section 6: Add or change financial institution details for ad hoc withdrawals

Financial institution

Branch

Account name

BSB  -  Account number

Please note that the account must be held either solely or jointly in your name.

## Section 7: Change to pension payment (eXpand 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. If you select fortnightly pension payments they will be scheduled every second Tuesday based on a start date of 6 July 2021.

For monthly, quarterly, half yearly and yearly payment dates you may select to have your pension payment paid on the 6th, 10th, 14th, 20th, 25th and 28th of each month.

I would like to select a specified start date.

Where you have elected to select a specific start date please select the date and month below:

6th  10th  14th  20th  25th or  28th of

Note: where no month is selected it will default to the next month available.

### B. Please select the level of annual pension required:

Select the level of annual pension required.

Minimum\*

OR

Maximum limit\*\* (Transition to retirement pension only)

Full maximum (10%)

OR

Pro-rata maximum

OR

Nominated amount \$  per annum  Net  Gross Indexation rate  %

OR

Nominated amount \$  per payment†  Net  Gross Indexation rate  %

\* If you commence your pension other than on 1 July, this amount will be pro-rated.

\*\* If you select a transition to retirement pension and do not complete this step, the full maximum (10%) pension payment will apply.

† This is a whole payment amount.

**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.

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

Name of financial institution																														
Branch address																														
Suburb																State			Postcode											
Account name																														
BSB				-				Account number																						

**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 8: Change of adviser

Licensee name																														
Adviser surname																														
Adviser given name(s)																														
Phone									Facsimile																					
AFS license number																														

### Section 9: Member declaration

**Please 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.myexpand.com.au/privacy](http://www.myexpand.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 authorise provision of information regarding my account to the above adviser (where a new adviser has been nominated).
- I declare that the details given in this form are true and correct.

**Please 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).

Signature of member/Power of Attorney or Guardian																Date			/			/								
Full name																														

**Please forward all correspondence and enquiries to**

**Post:** eXpand  
GPO Box 264, Melbourne VIC 3001

**Email:** [clientfirst@myexpand.com.au](mailto:clientfirst@myexpand.com.au)

**Telephone:** 1800 517 124

**Web:** [www.myexpand.com.au](http://www.myexpand.com.au)

Issued by IOOF Investment Management Limited ABN 53 006 695 021, AFSL 230524, as Trustee of the IOOF Portfolio Service Superannuation Fund ABN 70 815 369 818.