

CBA Group Super Plan

Update my Lifetime Pension

Use this form to change bank accounts, reversionary beneficiary and dependent children for your CBA Group Super Plan Lifetime Pension.

Important: Please provide us with as much information as possible. Please tick boxes where appropriate. Use **BLOCK** letters and dark ink when completing this form and ensure it is signed and dated. *DENOTES MANDATORY FIELD.

Member number

Office use only

C59444

1 Your current account details

Title	First name*	Middle name		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
Last name*	Date of birth (DD/MM/YYYY)*	Gender*		
<input type="text"/>	<input type="text"/>	<input type="radio"/> M <input type="radio"/> F		
Street Address / PO Box*				
<input type="text"/>				
Suburb/Town*	State*	Postcode*	Home phone number	Daytime phone number*
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Personal email address				Mobile phone number
<input type="text"/>				<input type="text"/>
<input checked="" type="checkbox"/> I wish to change details on my: (tick all that apply)	<input type="checkbox"/> Indexed Lifetime Pension	<input type="checkbox"/> Non-Indexed Lifetime Pension (Division B members only)		

Note: Unless you have chosen to receive printed information, Australian Retirement Trust will confirm this change electronically if we can. We'll email or SMS you if you have information to view in Member Online. If you would prefer information is posted to you in the future, change your preferences in Member Online or call us on 13 11 84.

2 Reversionary beneficiary (Spouse) and dependent children

YES I would like to update the spouse recorded on my CBA Group Super Plan Lifetime Pension, (sometimes referred to as your reversionary beneficiary).
Note: "Spouse" includes de facto spouses. You can find information for your division at art.com.au/cbasp under Defined Benefit members/PDS and Guides.

Date of marriage or date commenced living together as de facto spouse (DD/MM/YYYY)

Title	First name*	Middle name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Last name*	Date of birth (DD/MM/YYYY)*	Gender*
<input type="text"/>	<input type="text"/>	<input type="radio"/> M <input type="radio"/> F

I don't have an eligible spouse to receive reversionary payments

Do you have any dependent children?

Dependent child's name	Date of birth	Dependent child's name	Date of birth
<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"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Please continue over page](#)

3 Bank account details and consent to verify identity

*Before you're able to withdraw money from your super account, by law, Australian Retirement Trust needs to verify your identity. In the event we receive a request that relates to changing bank account details we need to ensure the request has been initiated by the account owner. This is why we request that you provide us with a certified copy of your driver's licence or passport.

With your consent, Australian Retirement Trust can use Equifax IDMatrix to verify your identity electronically. This program uses data held in places such as the Electoral roll, White pages, Department of Transport, the Passport Office, and Equifax credit information files to verify your details.

This includes consent for the personal information you have provided, such as name, date of birth and residential address, to be verified against personal information contained in your credit information file. Note that Australian Retirement Trust will not access your credit related information such as credit card and loan applications.

If you don't want us to be able to verify your identity electronically if required, that's fine too. Make sure you read the information at australianretirementtrust.com.au/id for acceptable identification documents and certification requirements.

By checking this box, I consent to my identity being verified electronically. I acknowledge that the document details I provide as evidence of my identity will be checked with the relevant body.

Please supply a copy of your bank statement which must be less than 12 months old and show your BSB number, your account number, the name on the account and your address.

Financial institution*

Name on the account*

BSB number*

Account number*

AND I have attached:

a copy of a document prepared by my Australian bank or credit union showing my BSB number, account number, account name and address, and is no more than 12 months old.

Important: For us to pay your benefit into your Australian bank or credit union account we require you to provide a document from them, such as a statement or online statement. The document must be current and no more than 12 months old and show your BSB, account number, account name and address. A copy of the original document can be accepted and doesn't need to be certified. Your payment cannot be processed via direct transfer without this.

Money cannot be paid into a credit card account, third party account or an overseas account. We will take care to ensure your money is paid in accordance with details you have provided. However, we accept no responsibility for any loss which occurs as a result of incorrect account details you provide us.

If the bank or credit union rejects the payment of your money, or if you don't provide proof of your account, we'll pay you by cheque and it may take longer than payments made electronically.

4 Checklist

We'll update your details as soon as we can. However, it's important to make sure you give us all of the information and documents we need to do this.

Have you completed all the mandatory fields on the form? Have you signed and dated this form? If you are under the age of 18 your parent or guardian will need to sign the form too.

Are you signing on behalf of the member? If you're signing on behalf of the member, you'll need to provide a certified copy of Guardianship papers or Power of Attorney documentation. Have you provided a copy of a document prepared by your bank or credit union showing the BSB, account number, name on the account, and your address, that is no more than 12 months old?

If you have not checked the box to have your identity verified electronically (on page 2), have you provided a certified copy of your driver's licence or passport?

5 Authorisation and declaration

I declare that all the details on this Update my Lifetime Pension form are correct and authorise Australian Retirement Trust to make the changes I have requested.

Full name (print in BLOCK letters)*

Note: If you are under the age of 18 your parent or guardian will need to complete section 6 below.

Member to sign here*



Date (DD/MM/YYYY)*

[→ Please continue over page](#)

I declare:

- I am authorised to sign on behalf of the member and have attached a certified copy of Guardianship or Power of Attorney papers, or
- I'm signing on behalf of (or in addition to) a member under the age of 18 as their parent or guardian and have attached appropriate proof of parent or guardianship, such as a certified copy of a certificate of birth or adoption papers.
- That all the details on this Update my Lifetime Pension form are correct. On behalf of the member, I authorise Australian Retirement Trust to make the changes I have requested.

Full name (print in BLOCK letters)*

Parent/guardian signature*



Date (DD/MM/YYYY)

Please return the form to
Australian Retirement Trust
Reply Paid 2924 Brisbane Qld 4001 or via
australianretirementtrust.com.au/contact-us

We are committed to respecting your privacy and take protecting the privacy of personal information seriously. Our Privacy Policy sets out how we do this including how we collect, hold and disclose personal information. For a copy of the Privacy Policy, please visit australianretirementtrust.com.au/privacy or call 13 11 84.

Australian Retirement Trust Pty Ltd ABN 88 010 720 840 AFSL No. 228975 Trustee of Australian Retirement Trust ABN 60 905 115 063