

INCOME STREAM/MARKET LINKED PENSION PAYMENT VARIATION FORM



Complete this form if you wish to change your Income Stream or Market Linked Pension (MLP) payment frequency, payment amount, payment type or bank account details.

If you wish to change your investment choice or change the investment option(s) that your regular payments are drawn from, please complete a *Change of Investment Choice (Income Stream/Market Linked Pension)* Form.

Please complete the form in BLOCK letters using blue or black pen. Print an 'X' to mark boxes where appropriate.

YOUR PERSONAL DETAILS	
Energy Super member number (if known): <input type="text"/>	
Surname: <input type="text"/>	
Title: Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Dr <input type="checkbox"/>	
Given names: <input type="text"/>	
Date of birth: (DD/MM/YYYY) <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
Residential address: <input type="text"/> <input type="text"/>	
State: <input type="text"/>	Postcode: <input type="text"/>
Postal address (if same as above, write "as above"): <input type="text"/> <input type="text"/>	
State: <input type="text"/>	Postcode: <input type="text"/>
Telephone (home): <input type="text"/>	
Telephone (work): <input type="text"/>	
Mobile: <input type="text"/>	
Primary email: <input type="text"/>	
Secondary email: <input type="text"/>	

YOUR PENSION PAYMENT AMOUNT
Please change my annual pension payment amount for this financial year to (choose one): <input type="checkbox"/> Minimum <input type="checkbox"/> Maximum <input type="checkbox"/> Nominated amount of: <input type="checkbox"/> \$ <input type="text"/> per payment (net after-tax) OR <input type="checkbox"/> \$ <input type="text"/> per payment (gross before-tax)
Please note: Your nominated amount must be within the current minimum and maximum annual payment amounts taking into account any income stream payments you have received in the current financial year. For the minimum percentage amounts that apply for the 2020/21 financial year please refer to the <i>Energy Super Income Stream PDS</i> or <i>MLP PDS</i>
For Income Stream and Transition to Retirement members only*: <input type="checkbox"/> I wish to increase my nominated pension payment amount each July at the rate of the Consumer Price Index (CPI). This option is not available if you have chosen the minimum or maximum payment amount. <input type="checkbox"/> I don't want my nominated pension payment amount increased each July at the rate of the CPI.
*The CPI option does not apply to MLP members.
Please note: Changes to payment amounts and frequencies received by the close of business on the 18th of the month will be updated for that month's pension payment.
Variation of your payment frequency to fortnightly or changes to payment amounts for fortnightly payments received by close of business on the Thursday before the processing day will be updated for that fortnight's pension payment.

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YOUR PAYMENT FREQUENCY

How frequently do you wish to receive your pension payments?

- Fortnightly
 Monthly
 Quarterly
 Half-yearly
 Annually

Please choose one of the below options.

- Please apply this payment frequency from the next available pension payment date.

OR

- I have chosen an annual pension payment and wish to receive my yearly payment in the month specified below.

OR

- I have chosen a quarterly or half-yearly payment and wish to receive my first payment in the month specified below.

Month:

CENTRELINK/DVA SCHEDULE

You will require an updated Centrelink/DVA Schedule if you or your spouse are receiving or have applied for entitlements.

- Please tick this box if you would like us to send you an updated Centrelink/DVA Schedule.

MEMBER DECLARATION

I agree and declare that all the details provided in this form are true and correct. I have read and understood the *Energy Super Income Stream Product Disclosure Statement (PDS)* or *MLP PDS* (as applicable). I understand the effects of changing my payment frequency and/or payment amount.

Applicant's signature:

Date: (DD/MM/YYYY)

 / /

YOUR BANK ACCOUNT DETAILS

Complete this section if you wish to change the bank account that your pension payments are paid into. If you are changing your bank account details, please attach a copy of a bank or credit union statement that shows your full name and account details. The account nominated below must be held in your name or in joint names.

Name of financial institution:

Account name (e.g. A B and C Jones)

BSB number:

Account number:

Branch/location:

PRIVACY STATEMENT - YOUR PRIVACY IS IMPORTANT TO US

This Privacy Statement provides you with details about the personal information we have collected from you, how we will manage that information and how to contact us if you have any privacy concerns, including if you want to make a complaint.

Why we collect personal information?

Energy Super* collects your personal information in order to:

- identify and verify your identify and conduct appropriate checks;
- answer your queries;
- communicate with you about your account and keep you informed about membership opportunities, including products, services, promotions and an online news subscriptions;
- understand your requirements and provide you with a product or service;
- manage and respond to complaints, investigations and disputes and report to dispute resolution bodies and regulatory bodies;
- process your application for membership; and
- manage our ongoing relationship with you as further described in this statement.

How we manage your personal information

We may disclose your personal information to our authorised personnel, third parties (e.g. employers) and our service providers, including our fund administration services provider (Link Group), insurers, OnePath Life Limited, MLC Life Insurance and Beazley, and ESI Financial Services Pty Ltd (a wholly-owned entity of Energy Super).

If we collect your personal information, we will only use and disclose your personal information for the purposes we collected it for or where you would reasonably expect us to.

We may use and disclose your personal information in order to:

- administer your account, provide insurance cover and provide services complementary to your account, such as seminars, newsletters, educational materials and access to financial advice;
- communicate with other superannuation fund trustees and administrators if you transfer your super to another fund;
- communicate with Government, Statutory or Regulatory bodies and Enforcement bodies;
- obtain legal and professional opinions;
- utilise a service from web hosting companies, software provider or web application;
- deal and communicate with any other organisation or person, where you have asked them to provide your personal information to us, asked us to obtain personal information from them, or where you have asked us to provide your personal information to them. For example, a family member or your spouse, a personal authorised under a third party authority, a third party claimant or witnesses in a claim;
- conduct market research and analysis, develop and improve our products and services, and inform you about additional products and services that may be of interest to you; and
- meet legislative and regulatory obligations.

What happens if you do not give us your personal information?

If we ask for your personal information and you don't give it to us, we may not be able to provide you with any, some, or all of the features of our products or services available to you.

How we collect your personal information

We generally collect your personal information directly from you, but may also collect it from other organisations such as your employer, your representatives, organisations who provide products or services to you jointly with us, and from publicly available sources. We may also be required to collect your personal information under anti-money laundering, corporations, family, insurance, superannuation and taxation legislation, or under court/tribunal orders.

We are likely to disclose your personal information to organisations and persons located overseas. These countries include New Zealand, the United Kingdom, Ireland, France and the United States of America, depending on the details of the transaction or other act you ask us to or we are required carry out. Our fund administrator, Link Group, may use service providers located in overseas countries for aspects of fund administration (a current list of countries can be found in their privacy policy at www.linkgroup.com.au).

Energy Super and the ESI Group* have a Privacy Policy which is available for download - or by contacting us on **1300 436 374** or **info@energysuper.com.au**. The Privacy Policy also contains information on how you may access and seek correction of your personal information held by Energy Super, and also how to complain about a breach of your privacy and how we will deal with that complaint.* Energy Super is a reference to Electricity Supply Industry Superannuation (Qld) Ltd (ABN 30 069 634 439) (AFSL 336567) (the Trustee), as Trustee for Energy Super (ABN 33 761 363 685) (the Fund). Energy Super is a member of the ESI Group.

RETURN THIS FORM

Energy Super

PO Box 10530

Brisbane Adelaide Street QLD 4000

F 07 3229 7523

(remember to send all pages of the form)

E member@energysuper.com.au

(as a scanned email attachment)

TALK TO US

T 1300 436 374

E info@energysuper.com.au

W energysuper.com.au

Energy Super

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