

Secure Super Account

Change of pension details request



Instructions

You should not complete this form unless you have read and understood the current Secure Super Account Product Disclosure Statement (PDS).

- Black or blue pen please
- Please use BLOCK letters.
- Please place a X in boxes where required.

Please send us your completed form by ONE of the following methods:

Email: superannuation@heritage.com.au
Fax: 07 4694 9782

Post: Secure Super Account, PO Box 190,
Toowoomba Qld 4350

Please note: if you fax or email the form, there is no need to send us the original.

Step 1 - Customer details

Account Number

Title

First Name

Last Name

Email

Date of Birth

Phone number (mobile)

Step 2 - Pension payment amount

I would like to change the amount of my pension payment and request that I receive the:

Minimum pension Specified pension of \$ per payment*

*Must be above the minimum amount as outlined in the PDS

Step 3 - Pension payment frequency details

I would like to change the frequency of my pension to:

Frequency*: Monthly Quarterly Half yearly Annually Month to receive payment (if annually)

* Payments will be paid on the 15th day of the month. If the 15th day falls on a weekend or public holiday, your income payment will be processed earlier so that it is accessible by the 15th. Quarterly payments will be made in March, June, September and December. Half yearly payments will be made in June and December.

Step 4 - Payment account

I wish to change the bank account my current pension is paid to:

Name of Bank, Credit Union, Building Society etc

Branch Address

Account Name

Branch Number (BSB)

Account Number

Step 5 - Authority

By signing this request form I am making the following statements:

- I declare that, to the best of my knowledge, the information I have provided on this form is true and correct.
- I authorise Heritage Bank to pay my benefit as instructed on this form.

Signature

Date