

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

Post Secure Super Account, PO Box 190 Toowoomba Qld 4350

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

Step 1 – Customer Details

Account number _____

Title _____ First name _____ Last name _____

Date of birth _____ Phone number (mobile) _____

Email _____

Step 2 – Pension Payment Amount

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

☐ Minimum pension ☐ Maximum pension (only applicable to Transition to retirement accounts).

☐ 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 _____