

Income account change of details

Please complete and sign this form and return by:

- ☒ Mail to: BUSSQ GPO Box 2775, Brisbane Qld 4001 or
☒ Email to: super@bussq.com.au.

Need help? If you require help completing this form call **1800 692 877** or email super@bussq.com.au.

If any of your personal details have changed, complete sections 1 and 8. Only complete other sections where a further change is being made. Please note that you can also update your payment information over the phone or online. Simply call **1800 692 877** or login to *MemberAccess* at **bussq.com.au**.

1 Personal details

BUSSQ member number for the account you wish to update

Date of birth (dd/mm/yyyy)

Title

Given names

Surname

Phone number

Email

Street number

Street address

Suburb/Town

State

Postcode

Postal address (if different to above)

Suburb/Town

State

Postcode

2 Your updated Income account payment frequency (if applicable)

I wish to receive my Income account payments (please tick which option you would prefer).

☐

Fortnightly

☐

Monthly

☐

Quarterly

☐

Half yearly

☐

Yearly

Month of next payment

Please note: Fortnightly payments will commence from the next fortnight after your request is processed. Monthly and less frequent payments will be made on approximately the 15th of the designated month.

3 Your Income account payment amount (if applicable)

The amount I wish to receive is (please tick which option you prefer).

TRANSITION TO RETIREMENT OR CHILD INCOME ACCOUNT

☐

4% Minimum

OR

☐

10% Maximum

OR

☐

An amount between your minimum and maximum

\$

per payment

RETIREMENT, BENEFICIARY OR DISABILITY INCOME ACCOUNT

☐

Minimum

OR

☐

An amount above the minimum (Refer to the Income account PDS for the current minimum amount)

\$

per payment

4 Your new financial institution details (if applicable)



Please attach a copy of a current bank statement for a personal bank account that is held in your name, or jointly in your name (BUSSQ is unable to pay your benefit into a business account). The statement must show your name, BSB and account number to enable the benefit to be paid by electronic funds transfer (EFT). Please ensure the account number provided to us is correct.

Financial institution name

Name in which the account is held (must be your name or jointly in your name)

BSB number

Account number

5 Proof of identity (if applicable)

To protect your superannuation account and satisfy our obligations under the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*, we need you to prove your identity before changing bank account details. You have two options for verifying your identity, please select one below.

Option 1

☐

Electronic verification

BUSSQ can easily verify your identity electronically. You just need to provide your driver's licence or passport number details below and we arrange the checks for you.

I authorise BUSSQ to disclose my name, address, date of birth and information below to a credit reporting agency to check and report to BUSSQ on whether the details I provide match those held by the credit reporting agency. Checking your identity this way is not a credit check. This check will not give BUSSQ access to any other information about you and will not impact your credit rating or be stored against your credit information file. If the details you provide cannot be matched we will advise you in writing, and you will need to supply us with certified documents – see Option 2.

Australian driver licence

Full name as it appears on your driver licence

Driver licence number

Card Number

Note: For help to locate your Card Number refer to the 'Certified documentation' section on page 5 of this form.

State of issue

Expiry date

 / / 2 0

Australian passport

Passport number

Country of birth

Full name as it appears on your passport

Option 2

☐

Provide certified documents (see the 'Certified documentation' section of this form for more information).



Please mail documents if providing certified proof to BUSSQ's address, which is provided on this form.

6 Have you met a condition of release? (if applicable)

If you want to convert your Transition to Retirement Income account (TTR) to a Retirement Income account, you need to select the condition of release that applies to you.

- ☐ I have reached preservation age and permanently retired*
- ☐ I am over age 65 (you may still be employed)
- ☐ I have ceased an employment arrangement after reaching age 60*

Date ceased work (dd/mm/yyyy) / / 2 0

- ☐ I have been assessed by BUSSQ's Trustee as being totally and permanently disabled

7 Privacy and other information

BUSSQ collects and uses your personal information in accordance with the BUSSQ Privacy Policy which is available from our website or by calling 1800 692 877. Please call us if you have any questions about your rights under the privacy legislation.

8 Authorisation and declaration (mandatory)

In signing this application:

- I have read and understood the Income account Product Disclosure Statement or Child Income account Terms and Conditions.
- I declare all information provided on this form is true and correct.
- If I have provided my email address and/or mobile phone number, I agree to BUSSQ sending me statements, notices, and other communications, electronically. I understand that I can change my communication preferences at any time via *MemberAccess* or by calling 1800 692 877.
- If deemed necessary by me, I have obtained financial advice.
- I am the person named on this form, the authorised beneficiary of the Income account or I have a power of attorney to act on the member's behalf and have supplied to BUSSQ my certified Power of Attorney and identity documentation.



Please sign and date.

Forms without both a signature and date are unable to be processed.

Signature



Dated (dd/mm/yyyy)

/ / 2 0

Once completed and signed please return this form to: BUSSQ GPO Box 2775, Brisbane Qld 4001 or email to super@bussq.com.au.

Please note: If you don't elect to verify your identity electronically, then your certified ID must be mailed to BUSSQ at the above address.

Certified documentation

You need to provide certified documents to prove your identity. Follow the below guide and mail your certified documents with your completed form to **BUSSQ GPO Box 2775, Brisbane QLD 4001**.

Please note certified proof of identity is only valid for a maximum of 12 months from the date the identification was certified.

Certified copies of the following documents can be used to prove your identity:

One of the following documents only:

- A current driver licence or permit issued under the law of a State or Territory.
- A passport issued by the Commonwealth which can be up to two years out of date, that contains a photograph of the person in whose name the document is issued.
- Proof of Age Card
 - A card issued under a law of a State or Territory for the purpose of providing the person's age which contains a photograph of a person in whose name the document is issued (includes Proof of Age Card or National Identity Card).
- National Identity Card
 - A card issued for the purpose of identification that contains a photograph and the signature of the person in whose name the document is issued; and
 - Is issued by a foreign government, the United Nations or an agency of the United Nations; and
 - If it is in a language that is not understood by the person carrying out the verification it must be accompanied by an English translation prepared by an accredited translator.

OR

One of the following documents:

- Birth certificate or birth extract
- Citizenship certificate issued by the Commonwealth
- Pension card issued by Centrelink that entitles you to financial benefits.

AND

One of the following documents:

- Letter from Centrelink regarding a Government assistance payment
- Notice issued by Commonwealth, State or Territory Government within the past 12 months, containing your name and residential address.

For example:

- Tax Office Notice of Assessment
- Rates notice from local council.

Have you changed your name?

If you have changed your name, in addition to the above listed certified documentation, you need to supply a certified copy of one of the following documents:

- Marriage Certificate (required even if the parties are separated)
- Decree Nisi, Certificate of Divorce or Decree Absolute
- Deed Poll Documentation.

Are you acting on behalf of someone else?

If you are signing on behalf of another person you will need to send by mail original certified copies of the following documents (we cannot accept these via email):

- Current Power of Attorney document (with each page of the document certified)
- The member's identity documents
- Your identity documents.

Certifying your documents

All copies of proof of identity documents should be certified as a true copy of the ORIGINAL by an authorised person. Some examples of authorised persons are:

- A Justice of the Peace or Commissioner for Declarations
- A Police Officer
- A finance company officer or representative of an AFSL license holder with five or more years continuous services with one or more licensees
- A lawyer, judge or magistrate
- Permanent employee of Australia Post with five or more years of continued service.

The certifier must sight the original and make sure both documents are identical, and then make sure all photocopied pages are certified as true copies by writing or stamping wording to that effect followed by their:

- Signature
- Name
- Qualification
- Date, and
- Phone number.



I certify this is a true copy of the original document.

Julie Preston
Justice of the Peace
19/06/2022
0412 345 678

Where to find the Card Number on your driver licence?

You can find your Card Number on the front and/or back of your driver licence. It is different from the licence number, as it's a unique identifier, which changes each time your driver licence is re-issued.

Note: The location for the Card Number does slightly vary amongst different state issued driver licences. The example images show where the Card Number is situated for the Queensland Driver Licence being both on the front and back.

If you need help to locate the Card Number on your driver licence, call us on **1800 692 877**.



Card Number



Card Number

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