

Change your bank account details - Mercer SmartRetirement Income

If you need help

For assistance, information on your pension, or to access the Privacy Policy and your personal information call the Helpline on **1800 931 040**.



This form can be completed digitally or by hand with a black or blue pen in uppercase with one character per box. **Please note** the form must be signed with a pen and submitted by post. The form cannot be signed digitally.

Step 1 – Complete your personal details

Title Mr Mrs Ms Miss Other Date of birth / /

Given names

Surname

Street address

Suburb State Postcode

Telephone - Mobile

E-mail

Member number Account/Policy number

Step 2 – Complete your new bank details

Bank Account Details

Please pay my pension to into the following bank account:

Name of institution

Account holder name

Branch BSB number - Account number

Note: The account nominated above must be in your name and must be an account for which you can sign to withdraw, either solely, or with another person.

Step 3 – Providing proof of your identity

Do you need to provide new certified proof of identity?

Please indicate (✓) if one of the following applies. Please note that if the information provided below does not match our records, your payment will be delayed.

- You have not provided certified ID previously
- You have changed your name (either your first or last name) – see below (under Name Change) for the list of specific documents required.
- Your date of birth was incorrect on our records and has been updated
- You have changed your bank account details

If you have ticked one of the items above, you will need to provide new certified proof of identity.


The easiest way to do this is as follows:

- photocopy both sides of your current drivers licence or passport
- take the photocopies of your ID and the original of the partly completed statutory declaration to Australia Post* or your local Police station**
- ask them to certify your ID.

* to be able to certify your documents, the Australia Post employee must be a permanent employee of the Australian Postal Corporation with 2 or more years of continuous service in an office supplying postal services to the public. Australia Post will charge a small fee for each photocopy you need to get certified.

** a police officer, sheriff or sheriff's officer can certify your ID.

The person certifying your ID documents will include the following details on the copy:

	←	A clear copy of the document that identifies you (i.e. your driver's licence (front and back) or passport)
	Certified true copy ←	Write or stamp 'certified true copy' of the original document
	<i>J. Sample</i> ←	The authorised person's signature
	Mr John Sample ←	Full name, qualification and registration number (if applicable) of the authorised person
	Justice of Peace ←	Date of certification (within 12 months of receipt)
Registration No. 123456789 ←		
Date: 01/02/2015 ←		

Alternatively, you can refer to the Completing Proof of Identity fact sheet on the fund's website at www.mercersuper.com.au for a list of other people who can certify your ID document(s) and witness your statutory declaration.

If you don't have a driver's license or passport

You will need to provide a certified copy of one document from each of the following groups:

- Birth certificate or birth extract¹
- Citizenship certificate issued by the Commonwealth
- Pension card issued by the Department of Human Services (Centrelink) that entitles the person to financial benefits

AND

- Letter from the Department of Human Services (Centrelink) or other Government body in the last 12 months regarding a Government assistance payment
- Tax Office Notice of Assessment issued in the last 12 months
- Rates notice from local council issued in the last 3 months
- Electricity, gas or water bill issued in the last 3 months
- Landline phone bill issued in the last 3 months (mobile phone bills will not be accepted)

Continued over

Step 3 – Providing proof of your identity (continued)

Name change

If you have changed your name, you must provide a certified copy of the relevant name change document¹, for example, a marriage certificate, deed poll, decree nisi/divorce order or change of name certificate issued by the Births Deaths and Marriages Registration office.

Signing on behalf of another person

If you are signing on behalf of the applicant you will need to provide the following:

- A **certified** copy of the Guardianship papers or Power of Attorney; and
- A **certified** copy of the appropriate proof of identity for the holder of the Guardianship or Power of Attorney; and
- A **certified** copy of the appropriate proof of identity of the applicant.

¹Translation

If your identification is written in a language other than English, the identification must be accompanied by an English translation prepared by a translator accredited by the National Accreditation Authority for Translators and Interpreters Ltd. (NAATI) at the level of Professional Translator or higher (or an equivalent accreditation), to translate from a language other than English into English.

Step 4 – Complete the checklist

To enable your payment to be processed promptly, please ensure you have correctly completed this form before returning it to the fund.

Have you:

- Provided your member details in **Step 1**?
- Completed all steps of the form and provided copies of documentation (where required)?
- Signed and dated the form (**Step 5**)?

Completing Proof of Identity

- Have you attached the correct identification as outlined in the Completing proof of identity section? Select the identification you have provided:
 - One Primary identification document; or
 - Two Alternative identification documents (one from each of the lists specified)
- Is your identification current? If providing an Australian Passport, one that has expired within the last two years is acceptable.
- Is your document correctly certified? Ensure the certifier has included ALL of the following on each page:
 - Written or stamped 'certified true copy'
 - Signature and printed name
 - Date – the date MUST be within twelve months of the date we receive your completed form.
 - Qualification (such as Justice of the Peace, Australia Post employee, etc)

Please refer to the Completing proof of identity section for more details on how to certify a document and a list of valid certifiers.

Your privacy

We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information about the other products and services offered by us and our related companies. If you do not wish to receive marketing material, please contact us on **1800 931 040**.

Our Privacy Policy is available to view at mercersuper.com.au or you can obtain a copy by contacting us on **1800 931 040**. If you do not provide the personal information requested, we may not be able to manage your superannuation. We may sometimes collect information about you from third parties such as your employer, a previous super fund, your financial adviser, our related entities and publicly available sources.

We may disclose your information to various organisations in order to manage your super, including your employer, the fund's administrator, our professional advisors, insurers, our related companies which provide services or products relevant to the provision of your super, any relevant government authority that requires your personal information to be disclosed, and our other service providers used to assist with managing your super. In managing your super your personal information will be disclosed to service providers in another country, most likely to our administrator's processing centre in India.

Our Privacy Policy lists all other relevant offshore locations. Our Privacy Policy sets out in more detail how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact us on **1800 931 040** or write to our Privacy Officer, **GPO BOX 4303, Melbourne, VIC 3001**.

Step 5 – Sign the form

By signing this form:

- I have read and understood this form.
- I understand and consent to my information being collected, disclosed and used in the manner set out in this form.

Signature Date / /

Please return your completed form to Mercer Super Trust GPO Box 4303, Melbourne, VIC 3001.