

Reboot your retirement income

1800 005 166

info@caresuper.com.au

GPO Box 1547, Hobart TAS 7001

Important information

Make sure you've read and understood the important information on the front of this form before proceeding. Call us if you have any questions.

Rebooting your account may take up to 10 business days.

Section 1

Your personal details

Member number

Income account number

Date of birth (DD MM YYYY)

Last name

Given name(s)

Residential address

Suburb/Town/City

State

Postcode

Preferred phone

Email

Section 2

Your current situation

Place an X in the box below that applies to you. Select one only.

I'm aged 60-64 and still working. I'm topping up my Transition to Retirement Income account.

I'm aged 60-64 and have permanently retired. I don't intend to work again for 10 or more hours a week.

Date of retirement (DD MM YYYY)

I'm aged 60-64 and have ended an employment arrangement since turning 60.

Date your employment arrangement ended (DD MM YYYY)

I'm aged 65 or older.



Section 3

Source of funds and timing

Your CareSuper account number

If you don't have a CareSuper account, we'll set one up for you.

I want to add the following funds to my CareSuper account before my retirement income account is rebooted:

If you want to add non-super money or combine other super or retirement income accounts with your CareSuper retirement income savings, call us before completing this form.

transfer my other super or retirement income account to CareSuper.

Fund name(s)

voluntary super contributions.

Approximate amount:

\$

I want to start my new retirement income account with:

the total combined balance of my CareSuper and CareSuper retirement income accounts.

This will close your CareSuper account and any insurance you have will cease. The final amount paid may vary due to investment earnings, tax and fees. Please check with your employer that any final contributions have gone into your account before you complete this form.

OR

An amount of: \$

The amount shown above will transfer into your new retirement income account, with any remaining funds staying in your CareSuper account. You need to leave at least \$6,000 in your CareSuper account to keep it open and there's a minimum opening account balance of \$20,000 to start a CareSuper retirement income. We may adjust the amount shown above to meet this requirement.

Timing of your reboot

I want to delay my reboot until after my next payment date.

Section 4

Member declaration

I authorise CareSuper to reboot my retirement income. By signing this form I acknowledge that:

- to the best of my knowledge, the information I've provided is true and correct
- I've read and understood the latest *Retirement Income PDS* or the *Transition to Retirement PDS*, whichever is applicable, available at caresuper.com.au/pds and agree to be bound by it
- I'll be bound by the policies, procedures, trust deed and rules that govern CareSuper and relevant laws and note that the trust deed prevails if there's any inconsistency
- the trustee has advised me to obtain personal financial advice and I've received all the information I need to understand the choices I've made
- my first payment will be made in the next available payment run
- I consent to the use of my personal information as outlined in CareSuper's *Privacy policy* available at caresuper.com.au/privacy-policy or by calling us on **1800 005 166**

Your signature

Date (DD MM YYYY)



Return the completed, signed and dated form via:

- upload using the Contact Us portal in **Member Online**
- email to info@caresuper.com.au
- mail to CareSuper, GPO Box 1547, Hobart TAS 7001