APPLICATION TO OPEN

A Pension account

Complete this form in black ink with a ballpoint pen using BLOCK letters | Any request will be invalid if not signed and dated.
Please mail this form to: Australian Food Super, Locked Bag 5390, Parramatta NSW 2124 | Member Hotline: 1800 808 614

Personal details

Member number

Date of birth (dd/mm/yyyy)

Sex

Mr/Mrs/Ms/Miss

Surname

Given names

Street number / PO Box

Street name

Suburb

State

Postcode

Telephone

Mobile

Email

Your Pension

Please tick the box that describes your circumstances.

1. ☐ I am over age 60 and under age 65 and have permanently retired.
2. ☐ I am over age 60 and under age 65 and have ceased employment with the employer who was making payments to Australian Food Super on my behalf.
3. ☐ I am age 65 or older.
4. ☐ I have reached age 60 but otherwise do not meet the criteria in 1, 2 or 3. In this case your pension will be considered a Transition to Retirement Pension.

Amount to be transferred to the Pension

Do you want to invest your whole Australian Food Super account balance or part of it into the Pension account?

☐ Whole amount

☐ An amount of **$** , , . (minimum $20,000)

☐ Keep my Australian Food Super accumulation account open with the minimum balance of $6,000 and move the rest to Pension.

Please note – if you have money from another superannuation fund that you want to include in your Pension, that amount must be transferred to Australian Food Super prior to commencing your Pension. If you close your Australian Food Super accumulation account any associated insurances will cease.

Member investment choice

You may nominate to invest your pension balance in one of eight investment options, or in a combination of the investment options. Please read the section of the PDS detailing the investment options on page 8 - 11 prior to making a choice:

I would like the balance of my Pension account to be invested in the following investment options:

Secure	%	Growth	%
Capital Stable	%	Australian Shares	%
Conservative Balanced	%	International Shares	%
Balanced	%	**TOTAL**	**% must equal 100%**

Please note: if you do not wish to make a choice, your pension account will be invested 100% in the Balanced Option, which is the default option.

Pension payment frequency

Please tick a box to indicate how often you wish to receive a pension payment. If you do not make a choice, your pension will be paid monthly.

☐ Twice monthly ☐ Monthly ☐ Quarterly ☐ Twice yearly ☐ Yearly

For details of payment dates refer to page 3 of the PDS.

For Twice yearly and yearly payments, please select a starting month (e.g. January).

Note: where you elect quarterly payments, you will receive payments in January, April, July and October.

How much pension do you wish to receive?

Please read the section titled "Receiving your pension payments" on pages 2 - 3 of the Product Disclosure Statement prior to completing this section.

☐ **MINIMUM AMOUNT**

If you tick this box you will receive the minimum amount that applies for each financial year. Refer to page 3.

OR

☐ **MAXIMUM AMOUNT**
Maximums apply to transition to retirement pensions only. Refer to page 3

OR ☐ **Choose your own payment amount** $, , . per payment

PLEASE NOTE THAT WHERE YOU NOMINATE THE MINIMUM OR MAXIMUM PENSION PART WAY THROUGH A YEAR THE PENSION PAYMENTS WILL BE PRO RATED (eg. Transition to retirement pension where maximum is chosen, commencing on 1 January, if 10% of balance is $30,000, then pension will be six payments of $2,500 per month ($15,000 ÷ 6).

PLEASE NOTE THAT WHERE YOU CHOOSE YOUR OWN PAYMENT AMOUNT, IF YOUR CHOSEN AMOUNT IS LOWER THAN THE MINIMUM OR HIGHER THAN THE MAXIMUM, WE WILL INCREASE OR DECREASE YOUR PAYMENT AMOUNT ACCORDINGLY.

Pension draw down from selected investments

If you elect to invest your Pension account in more than one investment option you may choose the source of your pension payments (check page 3 for details). If you leave this blank, your pension will be paid in the same proportion as your investment selection. If the total percentages do not add up to 100% we will not be able to process your selection.

Secure	%	Growth	%
Capital Stable	%	Australian Shares	%
Conservative Balanced	%	International Shares	%
Balanced	%	**TOTAL**	**% must equal 100%**

Payment instructions

Please provide the details of the bank, building society or credit union - account that you wish your pension to be paid to.

Account name

Bank / Building Society / Credit Union Name

BSB number

Account number

☐ I have attached a copy of a statement or other document from the financial institution (Bank, Building Society, or Credit Union) into which I wish my benefits to be paid, to verify the above account details. This account is in my name or a joint account in my name as I understand that payments cannot be made directly to a third party.

Reversionary beneficiary nomination

You can nominate your spouse (husband, wife or defacto, of any sex) as your reversionary beneficiary, refer to pages 4-5 of the Pension PDS for more information. It is important to note this nomination applies only to your Pension account and must be nominated at the time you start your pension..

Reversionary pensioner name

Date of Birth (dd/mm/yyyy)

Relationship (Wife, Partner etc)

Street number / PO Box

Street name

Suburb

State

Postcode

Telephone

Mobile

Email

Preferred beneficiary nomination

You can nominate one or more preferred beneficiaries that you wish to be considered for payment of your entitlements in the event of your death.

It is important to note that this nomination will be used as a guide only and the Trustee will use its discretion to ensure your benefit is paid in accordance with the Trust Deed and superannuation law. This nomination applies only to your Pension account.

Name of beneficiary

Relationship (Eg. Wife, Son)

Portion of Benefit

%

Name of beneficiary

Relationship (Eg. Wife, Son)

Portion of Benefit

%

Name of beneficiary

Relationship (Eg. Wife, Son)

Portion of Benefit

%

Must be whole numbers and add to: 100 %

PLEASE NOTE: You must complete, sign and date the *Privacy and Applicant's Declaration* section overleaf.

Privacy and applicant's declaration

I hereby declare that: **(please tick the box that applies to you)**

1. ☐ I am an Australian citizen, New Zealand citizen or permanent resident of Australia;

or

2. ☐ I am a temporary resident and I hold a Subclass 405 (Investor Retirement) or Subclass 410 (Retirement) visa

Personal Information Collection Notification Statement:

Australian Food Super advises that personal information it holds about you (including your name, address, date of birth and details of the financial assets) is collected to administer your superannuation account. Some or all of your personal information may be disclosed to contracted third parties in Australia and overseas. Your information may also be disclosed to Australian government agencies, law enforcement agencies and regulators, or as required under other Australian law, contract, and court or tribunal order. For further details about our personal information handling practices, including how you may access and correct your personal information and raise privacy concerns, visit our website at ausfoodsuper.com.au for a copy of our Privacy Policy, or contact us by 8am–8pm (Sydney time), Monday to Friday (excluding public holidays) to request a copy of our complete Privacy Policy.

Direct Marketing: From time to time the Australian Food Super Trustees may send members communication material, also known as direct marketing material, about specific offers and promotions which are available to Pension members only.

If you don't want Australian Food Super to use your personal information to send you direct marketing information tick this box: ☐

You can change your mind at any time.

Declaration:

I hereby apply for a Pension account with Australian Food Super. I confirm that I have personally received (including an electronic version issued or a print out of it, accompanied by or attached to this application form) and read and understood the Pension PDS. I acknowledge that this application is subject to the terms and conditions of the PDS.

- The information provided on this application form is true and correct.
- I understand that the Pension will operate in accordance with the rules contained in the Fund's Trust Deed. I agree to be bound by the provisions of the Trust Deed.
- I understand that taxation may be deducted from regular pension payments and any lump sum payments in accordance with Commonwealth Government taxation laws, and based on the information that I have provided.
- I understand that pension payments will be paid into my nominated bank account by the 27th day of each month (or 13th and 27th if "twice-monthly"), prior to 31 December and 30 June if twice yearly, prior to 31 January. 30 April, 31 July and 31 October if quarterly or prior to 30 June if yearly.
- I understand that I have 14 days from the date that you confirm my membership to withdraw my application (Cooling Off period).
- In any case, I may withdraw my entire balance from the Pension account at any time, and there will be no charge to me from Australian Food Super, to receive this payment. I agree to be notified of changes of details relating to my Pension account through the Australian Food Super website and Australian Food Super member communications.
- I agree that neither I nor any other person claiming through me has any claim against the Trustee or the Fund in relation to a payment made or action taken by Australian Food Super if the payment or instruction is made in accordance with the relevant conditions and includes instructions that are later shown to have been made by me.
- I acknowledge and agree that Australian Food Super has not expressed any opinion as to the appropriateness of any particular investment in the circumstances of any particular member.

Signature

Date (dd/mm/yyyy)

SIGN HERE

Please ensure that you provide <u>certified</u> proof of identity documents as outlined in the *Proof of Identity Fact Sheet* at ausfoodsuper.com.au/fact-sheets. We are legally required to have those documents before you can receive any pension payment.

Australian Food Super products are issued by Australian Meat Industry Superannuation Pty Limited (Trustee) ABN:25 002 981 919 RSE Licence: L0000895 AFSL: 238829 as Trustee for Australian Meat Industry Superannuation Trust (the Fund) ABN: 28 342 064 803 Registration No. R1001778.

Australian FOOD SUPER

Member Hotline 1800 808 614

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ausfoodsuper.com.au

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