

# Bendigo SmartStart Change of Details Form

# Bendigo Superannuation

This form can be used for the following products:

- Bendigo SmartStart Super<sup>®</sup>
- Bendigo SmartStart Pension<sup>®</sup>

Use this form if you wish to advise Bendigo Superannuation of changes to your account details.

Please complete in **black** or **blue** ink using **CAPITAL LETTERS** (except for email addresses) and where provided, mark answer boxes with an **X**.

## Step 1 Current member details

**Important note:** If you do not complete all parts of this section and we are unable to verify your identity, we may request that you provide certified proof of identification.

Member number	<input type="text"/>		
Title	<input type="text"/>	Surname	<input type="text"/>
Given name(s)	<input type="text"/>		
Date of birth	<input type="text"/> / <input type="text"/> / <input type="text"/>	Email	<input type="text"/>
Employer name	<input type="text"/>		

## Step 2 Change of name (if applicable)

To action your request, you must supply supporting documentation. Please refer to the 'Proof of identity requirements' section below.

### New name

Title	<input type="text"/>	Surname	<input type="text"/>
Given name(s)	<input type="text"/>		

I confirm I have enclosed certified copies of the required identification documentation.

### Proof of identity requirements

Please enclose one of the following change of name documents:

- A **certified copy** of my marriage certificate issued by the Registry of births, deaths and marriages; or
- A **certified copy** of my change of name certificate; or
- A **certified copy** of my marriage certificate and Decree Nisi (Divorce Papers).

### AND

**One** of the following primary identification documents issued in my name:

- A certified copy of my driver's licence issued under State or Territory law; or
- A certified copy of my passport

### OR

One of the following documents (original certified copies):	AND	One of the following documents:
<ul style="list-style-type: none"><li>• birth certificate or birth extract</li></ul>		<ul style="list-style-type: none"><li>• letter from Centrelink regarding a Government assistance payment; or</li></ul>
<ul style="list-style-type: none"><li>• citizenship certificate issued by the Commonwealth; or</li></ul>		<ul style="list-style-type: none"><li>• notice issued by Commonwealth, State or local council within the past twelve months that contains your name and residential address.</li></ul>
<ul style="list-style-type: none"><li>• pension card issued by Centrelink that entitles the person to financial benefits.</li></ul>		For example: <ul style="list-style-type: none"><li>- Tax Office Notice of Assessment</li><li>- Rates notice from local council.</li></ul>

**Certification of personal documents**

All copied pages of ORIGINAL proof of identification documents need to be certified as true copies by any individual approved to do so. The person who is authorised to certify documents must:

- sight the original and the copy and make sure both documents are identical;
- make sure all pages have been certified as true copies by **writing** or **stamping** 'certified true copy' followed by their **signature, printed name, qualification** (eg Justice of the Peace, Australia Post employee, etc) and **date**.

**A list of people who can certify a copy of an original document is available at [bendigobank.com.au/super](http://bendigobank.com.au/super).**

**Step 3 Change of contact details (if applicable)**

You can change your residential address online by logging into our secure website at [bendigobank.com.au/super](http://bendigobank.com.au/super) or by contacting us on 1800 033 426 instead of completing this form. However, you must use this form to change your PO Box or C/- address.

**Previous residential address**

Address

Town/Suburb  State  Postcode

**New residential address**

Address

Town/Suburb  State  Postcode

**New postal address (if different from residential address)**

Address

Town/Suburb  State  Postcode

**New phone number(s)**

Work phone number  Mobile

Home Phone number

New email address

**Step 4 Add/Remove/Change Financial Advisor (if applicable)**

**Adviser details**

Licensee

AFSL number  Licensee code

Adviser full name

Adviser code

Adviser signature  Date  /  /

If you are a new adviser, please also provide the following details:

Business name

Business address

Town/Suburb  State  Postcode

Postal address (if different to above)

Town/Suburb

State

Postcode

Work Telephone

Facsimile

Mobile

Email

Remove existing Financial Advisor from account

## Step 5 Pension payments (if applicable)

Please change my pension payment to:

Frequency:  Fortnightly (every 2<sup>nd</sup> Tuesday)  Monthly  Quarterly  Half Yearly  Yearly

Date:  6th  10th  14th  20th  25th  28th

(Note: only applicable where you have selected a frequency other than fortnightly above)

Pension Amount:  Minimum  Maximum (Transition to retirement members only)  Other Amount

Complete the following details only if you have selected 'Other Amount' from above:

Amount \$  Indexation Rate  %

Only complete this section if you wish to change the bank account in which your pension payments are being received.

Name of Bank

Branch Address

Town/Suburb

State

Postcode

Account Name

BSB number

Account number

Important Note: We require five business days to action your request. If we have not received your request in time to alter your next scheduled payment, your alteration will take effect from the following payment.

## Step 6 Member declaration

- I have read and understood Bendigo and Adelaide Bank Group's Privacy Policy which is available at [www.bendigobank.com.au/privacy-policy](http://www.bendigobank.com.au/privacy-policy) and agree that Bendigo Superannuation Pty Ltd (Bendigo Super) and Bendigo and Adelaide Bank Group may collect, use and disclose my personal information for the purposes of administering my account and providing relevant services to me, in accordance with the law.
- I authorise the above changes to be made to my membership details.
- In respect of electronic instructions (email, fax) in relation to this request, I agree and acknowledge that Bendigo Superannuation:
  - Will not accept electronic instructions unless it is accompanied by my scanned or faxed signature;
  - Is not responsible for any loss or delay that results from a transmission not being received by Bendigo Superannuation;
  - Will only process my electronic instructions if they are received in full and have been fully signed by me;
  - Will not accept a receipt confirmation from the sender's facsimile machine or computer as evidence of receipt of the instructions unless the confirmation receipt clearly applies, on its face, to the specific instructions transmitted electronically (e.g. these instructions appear on the same page as the confirmation) and is not able to be tampered with;
  - Will not compensate you for any losses relating to electronic instructions except to the extent of any negligence or bad faith on the part of Bendigo Super, unless required by law; and

- Does not take responsibility for any fraudulently or incorrectly completed or signed electronic instructions. In the event of any such fraud, I agree to release Bendigo Superannuation from, and indemnify Bendigo Superannuation against, all losses and liabilities whatsoever arising from Bendigo Superannuation acting reasonably in good faith in accordance with any instructions received electronically bearing your member number and a signature purportedly mine.
- If you are investing through a financial adviser and their details are included on this form, your financial adviser will be able to make enquiries regarding your account, provided with copies of correspondence regarding your account and will have access to view your account online. They will not have authority to operate your account. If you would like your financial adviser to be able to operate your account you will need to provide them with a financial adviser authority by completing the 'Appointment of Representative' form located on our website.

Member Signature  Date  /  /

Previous Signature (if your signature has changed due to a change of name)

**Contact details:**

Bendigo Superannuation	Phone: 1800 033 426
Bendigo SmartStart	Fax: 03 6215 5800
GPO Box 264	Email: <a href="mailto:superannuation@bendigobank.com.au">superannuation@bendigobank.com.au</a>
Melbourne VIC 3001	Website: <a href="http://bendigobank.com.au/super">bendigobank.com.au/super</a>

**Note: If you are advising us of a change of name, please send us your request along with all supporting documentation by post. Change of name requests received via fax or email will not be accepted.**