

NESS Pension Application Form

Please complete and return this form to: NESS Super, Locked Bag 5042, Parramatta NSW 2124
Complete in pen using CAPITAL letters or type directly into this form and print it out.
Use (X) to mark boxes. This request must be signed and dated.

 **Website:** www.nesssuper.com.au
 **Email:** nessadmin@aas.com.au
 **Freecall:** 1800 022 067

! In order to apply for a NESS Pension you must be a member of NESS Super

Section 1. Applicant's details

NESS Super member number

Date of birth (ddmmyyyy)

Gender

Mr/Mrs/Ms/Miss

Surname

Given names

Email address

Residential address

Street number

Street name

Suburb/Town

State

Postcode

Postal address (if different to residential address)

PO Box/Street number

Suburb/Town

State

Postcode

Telephone (daytime)

Mobile

Section 2. Election to receive a pension

Please complete the declaration that applies to you:

I am applying for a NESS Transition to Retirement Pension after reaching my preservation age

I am applying for a NESS Account Based Pension, and

I am 65 years or over

I am 60 years and over and ceased work on:

I have reached preservation age and permanently retired from the workforce on:

I have been declared totally and permanently disabled and my last date of employment was:

Date of birth	Preservation age (years)
Before 1 July 1960	55
1 July 1960 – 30 June 1961	56
1 July 1961 – 30 June 1962	57
1 July 1962 – 30 June 1963	58
1 July 1963 – 30 June 1964	59
After 30 June 1964	60

 Please turnover

Section 8. Investment choices

Please refer to page 22 to page 25 of the NESS Pension PDS at www.nesssuper.com.au for more information about NESS Pension's investment options, before making a selection.

Your investment options can be mixed in unlimited combinations to achieve your personal investment objectives.

NESS Account based Pension Only

Choose (X) one option.

Investment option 1

or You can choose the same investment options to apply to both your pension account balance and pension payments and transactions,

Investment option 2

You can choose different investment options to apply to your pension account balance and future pension payments and transactions. Please note that if there are insufficient funds in the investment option you have chosen for your future pension payments and transactions, the payment will be made from your NESS Pension account balance options in proportion to the balance held in each investment option.

	Investment option 1	Investment option 2	
	Pension account and future pension payments and transactions	Pension account balance only	Future pension payments and transactions only
Cash	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Cautious	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Moderate	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Assertive	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Aggressive	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Total must add to 100%	1 0 0 %	1 0 0 %	1 0 0 %

NESS Transition to Retirement Pension Only

Choose (X) one option.

Investment option 1

or You can choose the same investment options to apply to both your pension account balance and pension payments and transactions,

Investment option 2

You can choose different investment options to apply to your pension account balance and future pension payments and transactions. Please note that if there are insufficient funds in the investment option you have chosen for your future pension payments and transactions, the payment will be made from your NESS Pension account balance options in proportion to the balance held in each investment option.

	Investment option 1	Investment option 2	
	Pension account and future pension payments and transactions	Pension account balance only	Future pension payments and transactions only
Cash	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Stable	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
NESS MySuper	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
High Growth	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Australian Shares	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Overseas Shares	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Property	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Total must add to 100%	1 0 0 %	1 0 0 %	1 0 0 %

 Please turn over

9. Proof of identity

This section must be completed in full.

By law, we have to confirm your identity before we can release any benefit. This protects the account against fraud or theft. You have two options to prove your identity.

Check (X) the box to make your selection.

Option 1: I would like to use electronic verification

By providing you my Medicare, driver's licence or Australian passport details below, I authorise the use of my personal details (including the information below) for the purpose of electronic data verification using reliable and independent data sources. I understand the Fund uses a third party for this purpose.

! **Important:** Make sure the details you provide are accurate. If your personal details provided at the start of this form do not match your electronic identification details, we will not be able to use your personal details to prove your identity, which will delay processing your request.

You must provide details of **at least two** of the following documents:

Document 1: Medicare card

Full name as shown on your Medicare card, including initials

Card number:

Valid to

I am person number on this card

Document 2: Australian Driver's Licence

First name as shown on your licence

Surname as shown on your licence

Australian Driver's licence number

Expiry date

State of issue

Document 3: Australian Passport

Given name/s (including middle Name) as shown on your passport

Surname as shown on your passport

Australian passport number

Place of birth as shown on your passport

Country of birth (not shown on passport):

Family name at birth (not shown on passport)

Option 2: I would like to provide certified copies of identification documents

I have attached copies of my certified proof of identity with this form. Please see the top of page 7 of this form for information regarding the type of documents required to prove their identity.

i Completing proof of identity

If you have elected Option 2 to complete your proof of identity, please attach **certified photocopies of documentation** to prove you are the person to whom the superannuation entitlements belong.

Please tick the box/es to show which documents you have attached to this form.

(Only provide original documents if you are submitting this form in person at the administrator's office or at our offices).

I have attached:

<p>EITHER:</p> <p>Two of the following documents:</p> <p><input type="checkbox"/> A current driver's licence or permit issued under the law of a State or Territory that contains a photograph of the person in whose name the document is issued</p> <p><input type="checkbox"/> 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</p> <p><input type="checkbox"/> Medicare card.</p>	<p>OR:</p> <p>One of the following documents:</p> <p><input type="checkbox"/> Birth certificate or birth extract</p> <p><input type="checkbox"/> Citizenship certificate issued by the Commonwealth</p> <p><input type="checkbox"/> Pension card issued by Centrelink that entitles you to financial benefits.</p>	<p>AND:</p> <p>One of the following documents:</p> <p><input type="checkbox"/> Letter from Centrelink regarding a Government assistance payment</p> <p><input type="checkbox"/> Notice issued by Commonwealth, State or Territory Government within the past 12 months, containing your name and residential address. For example:</p> <ul style="list-style-type: none"> – Tax Office Notice of Assessment – Rates notice from local council
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If you are unable to provide accepted certified documents, please contact NESS Super for other options.

Certified proof of identity

All copied pages of ORIGINAL proof of identification documents (including any linking documents) need to be certified as true copies by an authorised person (see below).

The following can certify copies of the originals as true and correct copies:

- a permanent employee of Australia Post with five or more years of continuous service
- a finance company officer with five or more years of continuous service (with one or more finance companies)
- an officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having five or more years of continuous service with one or more licensees
- a notary public officer
- a police officer
- a registrar or deputy registrar of a court
- a Justice of the Peace
- a person enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia as a legal practitioner
- an Australian consular officer or an Australian diplomatic officer
- a judge of a court
- a magistrate, or
- a Chief Executive Officer of a Commonwealth court.

Have you changed your name or are you signing on behalf of another person?

If you have changed your name or are signing on behalf of the applicant, you will need to provide a certified linking document. A linking document is a document that proves a relationship exists between two (or more) names.

The following table contains information about suitable linking documents.

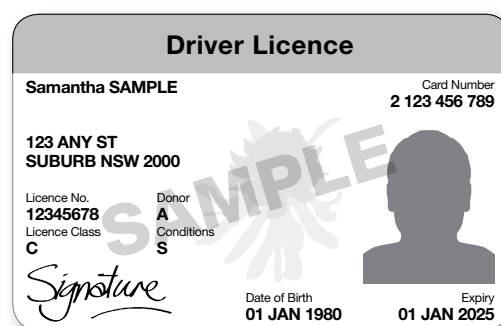
Purpose	Suitable linking documents
Change of name	Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office
Signed on behalf of the applicant	Guardianship papers or Power of Attorney

Example of how to certify identification

- 1 Take a photocopy of both sides of the original document (see list of documents above).
- 2 Take the photocopy and the original document(s) to an authorised person.
- 3 The authorised person should state on the front side of each copy: 'This is a true and correct copy of the original.'

The authorised person should write on each copy their:

- full name;
- qualification;
- registration number (if applicable);
- date; and
- signature.



This is a true and correct copy of the original

Signature

Sergeant Sam Jones
42 Super Street, Supertown
0123 456 789
10 December 2015
(02) 9876 6432

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