

Living Super (Pension and transition to retirement)

Change of bank account



About this form

You can use this form to change your bank account details for your Pension or TTR payments.

Step 1: Your account details

I would like to change the linked bank account on the following Living Super Pension/Transition to Retirement account.

Client number

Living Super account number

First name

Last name

Date of Birth

 / /

Step 2: Changing linked bank account

Pension Payment details (For Pension and TTR accounts only)

Name of Bank, Credit Union, Building Society etc.

Branch No. (BSB)

Name of bank account (Must be in the same name as the Living Super or TTR)

Account number

Please check that the details above are correct as ING does not validate the name of the account you are sending funds to and does not guarantee that funds sent in error to these details can be recovered.

Important Information: Your pension payments are not guaranteed and will end if your Living Super account balance is exhausted. You can request online to change the frequency of your pension payments, or the amount of your pension payments, provided it satisfies any minimum or maximum payment limits that apply. We may also adjust the amount of your pension payments to ensure it satisfies these limits.

Step 3: Declaration and Authority

Signature

Date (DD/MM/YYYY)

 / /

Step 4: What to do when you have completed this form

When you have completed and signed this form, please email to: livingsuper.adviser@ing.com.au
(by 12pm Friday before your next scheduled pension payment).

For the curious: Diversa Trustees Limited ABN 49 006 421 638, AFSL 235153, RSE L0000635 is the Trustee of the ING Superannuation Fund ABN 13 355 603 448 (Fund) and the issuer of interests in the Fund. ING Living Super is a product issued out of the Fund. ING, a business name of ING Bank (Australia) Limited ABN 24 000 893 292, AFSL 229823, is the Promoter of the Fund and the issuer of this document. You should consider the Product Disclosure Statement and Financial Services Guide available at ing.com.au when deciding whether to acquire, or to continue to hold, the product.

Step 4: Payment details

Name of Bank, Credit Union, Building Society etc.

Branch address

Branch No. (BSB)

Account number

Account name

Please check that the details above are correct as ING does not validate the name of the account you are sending funds to and does not guarantee that funds sent in error to these details can be recovered.

Step 5: Tax Deduction Notice

In relation to personal contributions made to your super account, please indicate whether you are:

- eligible to claim a tax deduction
- not claiming a tax deduction

If you're eligible to claim a tax deduction please complete a Notice of Intention to Claim a Tax Deduction Form and send to ING with this form. To download the form log on to your account, go to 'My Super Finances' and select 'downloads and links' or contact us on 133 464.

Note: If you do not submit a Notice of Intention to Claim a Tax Deduction or the Trustee does not accept the notice prior to your withdrawal, any personal contribution that forms part of the withdrawal will be treated as non-concessional contributions and you will not be able to claim a tax deduction in respect of the contribution.

Step 6: Declaration and authority

By signing this form I am making the following statements:

- The information completed is true and correct
- I am aware that I may ask the Trustee for information that I reasonably require for the purpose of understanding my benefit entitlements in ING Living Super including fees or charges that may apply to any withdrawal request and the effect of any withdrawal request on any entitlements (such as insurance cover) and I have either sought this information, or do not require such information.
- I authorise ING Living Super to pay my benefit as instructed on this form and understand and acknowledge the implications and the effects of this transaction.
- I discharge the Trustee from all further liability in respect of the benefits paid.
- If I have insurance cover, I understand that such cover will cease for any event on or after the date the full account balance is paid.
- I understand that the withdrawal proceeds will be calculated in accordance with the governing rules applicable to ING LivingSuper after all relevant information is received by ING Living Super.

Signature

Date (DD/MM/YYYY)

 / /

Step 7: Verifying your identity

To withdraw funds from your account you will need to attach your certified identification documentation.

To verify your identity follow the four simple steps below:

Step 8.1 Choose either one identification document from list A or two documents from list B over the page

Step 8.2 Select an authorised person to certify your documents

Step 8.3 Take copies and originals to the certifier and ask them to complete the certification

Send the certified documents to ING REPLY PAID 4307 SYDNEY NSW 2001.

Step 8: Proof of identity

Step 8.1: Choose identification documents

You need to choose either one document from List A or two documents from List B. Please note the certified copies will not be returned.

NOTE: The documents must verify your Full Name AND either your Residential Address OR Date of Birth.

List A

- Australian Driver's Licence (must be current, show current residential address and photograph)
- Australian Passport (either a current passport or a passport that expired within the last 2 years)
- Proof of Age Card / NSW Photo Card (must be current and show date of birth and photograph)
- International Passport (current, containing a photograph and a signature and accompanied by a translation from a Professional Translator accredited by the National Accreditation Authority for Translators and Interpreters if not in English)

List B

One of the documents

- Birth Certificate (issued by a State or Territory in Australia)
- OR
- Citizenship Certificate (issued by the Commonwealth of Australia)
- OR
- Pension Card or Health Card (must be current and issued by Centrelink entitling financial benefits)

AND

- Social Security notice issued by the Commonwealth, State or Territory in the past 12 months containing your name and residential address which records financial benefits provided to you
- OR
- Notice Issued by the Australian Tax Office within the past twelve months that contains your name and residential address and records debts payable by you
- OR
- Rates or Utilities notice issued in the last 3 months containing your name and residential address and recording the provision of services to you/your address

Step 8.2: Select a certifier

Take the originals and copies of your identification documents to a document certifier from the list below. Ask them to follow the instructions in Step 3.

1. A Pharmacist
2. A Justice of the Peace
3. A Notary Public Officer
4. A Medical Practitioner or Nurse
5. A Police Officer
6. An Accountant (CA/CPA)
7. A Legal Practitioner
8. A Full-time teacher (school or tertiary)
9. Bank/Credit Union/Building Society Officer with at least two years continuous service
10. A permanent employee of a Commonwealth, State/Territory or local government with at least two years continuous service.

Step 8.3: Complete certification

The person who is authorised to certify documents must sight the original and the copy, make sure the documents are identical and then certify all pages as true copies. To do this they complete the two steps below:

1. Certify as true copies by writing or stamping "I hereby certify that these pages are a true copy of the original document shown to me on [date]"
2. Sign each document and print Name and Certifier Classification. For example; John Smith, Accountant