

PENSION APPLICATION FORM
Instructions

Please complete this form if you wish to open a pension application

- Use blue or black pen only.
- Please use BLOCK letters.
- Please place an X in boxes where required.
- Make sure you read all the instructions before you complete this request.

Please send us your completed form to:

Australian Military Bank

Post: PO Box H151 Australia Square NSW 1215

1. CHOOSE YOUR PLAN

Capital Guaranteed Transition to Retirement Pension - I have reached my preservation age and am still working.

OR

Capital Guaranteed Pension - Please mark (X) the following situations which apply to you:

I have reached my Preservation Age and have permanently retired from the workforce (Statutory Declaration required).

I have been declared Totally and Permanently Disabled and no longer working.

I am age 60 or over and have left my employer after turning age 60 (Statutory Declaration required).

I am age 65 or over.

2. COMPLETE YOUR DETAILS

Title	Given name(s)	Middle Name	Surname or family name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Residential address

Suburb/Town

State

Postcode

Date of Birth

 / /

Home number

Work number

Email address

Mobile number

Are you a member of Australian Military Bank?

Yes, please provide member number:

Rank (if applicable)

No

Are you a Tax Resident in a jurisdiction other than Australia? Yes No

If yes, please specify the country and provide your Tax Identification Number (TIN)

Country 1

Tax Identification Number (TIN)

Country 2

Tax Identification Number (TIN)

Country 3

Tax Identification Number (TIN)

Note: a TIN is the tax reference number issued to you by the tax office in the country where you are a resident for tax purposes. Where a country does not issue a TIN, complete an equivalent number, for example a social security, national insurance, personal identification or a resident.

Are you a Politically Exposed Person (PEP)?

Yes No

A Politically Exposed Person (PEP) is an individual who holds a prominent public position or function in a government body or an international organisation. It also includes their family members and close associates. For example:

- A high ranking member of the armed forces (top three senior levels of each service)
- Heads of state, government and cabinet ministers
- Senior government officials
- Senior executive of state-owned organisation

A PEP is also the immediate family member of a person referred to above, including a spouse, defacto partner or child.

3. TAX FILE NUMBER (TFN)

Tax File Number

Please note: If we do not hold your TFN, by law we will be unable to accept contributions from you.

Under the Superannuation Industry (Supervision) Act 1993, the fund is authorised to collect your TFN, which we will only use for lawful purposes in the administration of your superannuation benefit. These purposes may change in the future as a result of legislative change. We may disclose your TFN to another superannuation provider, when your benefits are being transferred, unless you request in writing that your TFN is not to be disclosed to any other superannuation provider. We may also disclose your TFN to our administrator and the Commissioner of Taxation in order to provide all of the services required in the administration of your account. We may also use your TFN to identify multiple accounts within the fund and consolidate them when permitted under law. It is not an offence not to advise us of your TFN, however, there are advantages in doing so:

- the fund will be able to accept all types of contributions to your account including superannuation guarantee contributions, other before-tax contributions, and after-tax contributions
- the tax on contributions to your account will not be increased as a consequence of not providing your TFN
- no additional tax (that is, beyond that which ordinarily may apply) will be deducted when you start drawing down on your superannuation benefits
- it will make it easier to trace different superannuation accounts in your name and match your accounts in the fund so you receive all of your superannuation benefits when you retire.

4. INVESTMENT DETAILS

	Option 1		Option 2
	Percentage of Balance (%)		Dollar Amount (\$)
Variable Interest rate		Min. 20% of Account Balance	
Fixed Term Interest rate *		Max. 80% of Account Balance	
Total	100%		
	Total must equal 100%		Total must equal 100%

**Minimum Investment per fixed term is \$20,000

*The actual interest rate applied to the fixed term will be the rate current at the time of investment and not the date we received your request. Please note: Capital Guaranteed Pension account allows you to invest a maximum of 80% of account balance in fixed term option

Select your term (fixed term only)

12 months 24 months OR 36 months

5. PENSION PAYMENT DETAILS

I request that my pension payment be made:

Yearly (June) Quarterly (June, September, December and March)
 Half yearly (June and December) Monthly

With the first payment to be made on: 15th OR 30th of _____ Month _____ Year

Note: Your first payment date is subject to Australian Military Bank having had reasonable time to process your application and your correct details being provided. Pension payments must meet government standards. We reserve the right to adjust your nominated pension payment so that the government standards are met.

Regular pension payments required:

- Pay minimum prescribed amount;
 Pay maximum prescribed amount (Transition to Retirement only); or
 Pay the following amount * \$ _____

*This amount must be at least the minimum prescribed amount. See the Receiving and Accessing your Pension clause in the 'How our Capital Guaranteed Pension Works' section of the PDS for more details. A copy of PDS is available on our website www.australianmilitarybank.com.au.

COMPLETE BANK ACCOUNT DETAILS FOR RECEIPT OF PENSION PAYMENTS

Account Name (must be held in your name or jointly in your name)

Name of Financial Institution

Branch Name

Branch No. (BSB)

Account Number

6. TRANSFER AUTHORITY

Transfer Existing Capital Guaranteed Super Member No.

Full balance or Partial amount of \$ _____

Keep my Capital Guaranteed Super open with minimum balance

EXTERNAL TRANSFER

ROLLOVER 1

Fund Name

Fund Phone Number

Fund USI

Electronic Service Address SMSF Only

Member or Account no

Fund ABN

Fund Postal Address

Suburb/Town

State

Postcode

Full Balance or Partial amount of \$

ROLLOVER 2

Fund Name

Fund Phone Number

Fund USI

Electronic Service Address SMSF Only

Member or Account no

Fund ABN

Fund Postal Address

Suburb/Town

State

Postcode

Full Balance or Partial amount of \$

MAKING A LUMP SUM CONTRIBUTION

You can make a lump sum contribution to your Capital Guaranteed Super account to transfer to your Capital Guaranteed Pension account. Please note, there are restrictions on the amount you can contribute in a tax effective manner.

I wish to make the following lump sum contribution to my super account to transfer to my Capital Guaranteed Pension account.

\$

AUTHORISATION

By signing this form, I am making the following statements:

- I declare I have fully read this form and the information completed is true and correct.
- I am aware I may ask my superannuation provider for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits and do not require any further information.
- I discharge the superannuation provider of my FROM fund of all further liability in respect of the benefits paid and transferred to Australian Military Bank Capital Guaranteed Pension.
- I request and consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect to this transfer.
- I authorise all relevant information on my/our investments, superannuation, account based pension and any other financial information be released at their request, to representatives of Australian Military Bank Ltd.

Full name: _____

Signature

Date

7. PRIVACY STATEMENT

Please read this Privacy Statement to see how Australian Military Bank uses your personal information:

Australian Military Bank (ABN 48 087 649 741) of (PO Box H151 Australia Square NSW 1215), collects your personal information (PI) to run your super account (including insurance), improve our products and services and keep you informed. If we can't collect your PI we may not be able to do these tasks. PI is collected from you and sometimes from third parties. We will only share your PI where necessary to perform our activities with our service providers, as required by law or court/tribunal order, or with your permission. Your PI may be accessed overseas by some of our service providers. Our Privacy Policy details how to access and change your PI, as well as the privacy complaints process. For complete details on the above go to www.australianmilitarybank.com.au or call us on 1300 132 328.

8. DECLARATION

VERIFYING YOUR IDENTITY

The *Anti-Money Laundering and Counter-Terrorism Financing Act 2006* requires us to collect information about you and establish your identity before paying benefits. If we do not hold the required identification documents you will be required to provide these.

We may also require you to provide proof of identify prior to being able to access your benefits in cash (lump sum or pension payments) or purchase a superannuation pension. You will be notified of any requirements when applicable. If you do not comply with these requirements there may be consequences for you, for example, a delay in the payment of your benefits.

DECLARATION AND ACKNOWLEDGMENT

I acknowledge and agree that:

- I have read and understood the Australian Military Bank Capital Guaranteed Pension account PDS and that all details given in the application are true and correct.
- I am applying for a Capital Guaranteed Pension account and agree to be bound by the terms and conditions in the PDS as varied from time to time;
- I am aware that my provision and your receipt of my tax file number are authorised under the Retirement Savings Accounts Act 1997;
- Australian Military Bank will deduct any applicable taxes, government charges and duties from my Capital Guaranteed Pension account;
- That the interest rate applying to a Capital Guaranteed Pension account will vary from time to time;
- I have met a condition of release and am entitled to access my superannuation under superannuation and retirement savings account law; and
- I have read the privacy statement and consent to my personal information being collected, disclosed and used as described in that statement.
- I understand that pension products are complex and that different taxation and social security implications may apply to my pension depending on my personal circumstances.
- I acknowledge that Australian Military Bank can provide General Product Advice and I should consult a qualified adviser for financial/personal advice.

Full Name: _____

Signature

Date

WHAT TO DO WITH THIS FORM

Please send us your completed application, along with certified copies of supporting documentation as outlined in Section 15 of the Pension PDS, to the following address:

Australian Military Bank
PO Box H151, Australia Square, NSW 1215

Enquires can be directed to:
Ph: 1300 13 23 28

AUSTRALIAN MILITARY BANK INTERNAL USE ONLY

Member Number:

I confirm that:

- the member has been given an Australian Military Bank Capital Guaranteed Pension Product Disclosure Statement;
- tax file number has been provided;
- the member has signed both the transfer authority and declaration;
- that no personal advice was provided to the member at the time of opening an account.

Name of authorised Australian Military Bank employee:

Signature

Date