

Mercy Super Income Stream

Change details advice

If you need help

For assistance call the Helpline on 1300 368 891.

Step 1 – Input member details

Please print in black or blue pen,
in uppercase, one character per box.



Membership number

Date of birth

Given names

Surname

Daytime Telephone

Mobile

E-mail

Comments (if applicable)

Effective date of change

Step 2 – Advise details of new name (if applicable)

☐ Insert new surname

☐ Insert new given names (if changed)

Select new Title (if changed)

Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other

☐ I have attached a certified copy of my Marriage Certificate, Deed Poll or change of name certificate from Births, Deaths and Marriages Registration office to support my name change.



Step 3 – Advise details of new address (if applicable)

☐ **Postal address** – attach a certified copy of a recent bill, mail item or driver's licence that displays your new postal address.

New postal address

Suburb

State

Postcode

Daytime Telephone

Mobile

E-mail

Step 4 – Change to Preservation Status

*To be completed by Pre-retirement
(transition to retirement) members only*

Complete this section if your circumstances that affect the Preservation status of your Income Stream account have changed.

The preserved portion of your benefit cannot be released to unpreserved status until one of the following conditions have been met:

- You are at least 65 years of age;
- You are at least 60 years of age and have ceased employment since attaining age 60;

OR

- You are between 55 and 60 years old, have ceased employment and have permanently retired from the workforce.

Permanently retired is defined as never being gainfully employed again for more than 10 hours per week. Gainful employment means employed or self-employed for gain or reward in any business, trade, profession, calling, occupation or employment.

If you are eligible, please complete one of the following declarations and **attach proof of age** to allow your benefit payment to be processed (e.g. certified photocopy of your driver's licence, passport or birth certificate).

(select an option ✓)

- ☐ Yes, I am at least 65 years of age.
- ☐ Yes, I am at least 60 years of age and I have ceased employment since attaining age 60.
- ☐ Yes, I am at least 55 years of age, have ceased employment and intend to permanently retire from the workforce.



Your Privacy

The Fund is administered by us along with our service provider, Mercer Outsourcing (Australia) Pty Ltd. We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super.

We may also use it to supply you with information about the other products and services offered by us and our related companies.

If you do not wish to receive marketing material, please contact us on 1300 368 891.

Our Privacy Policies are available to view at www.mercysuper.com.au or you can obtain a copy by contacting us on 1300 368 891.

If you do not provide the personal information requested, we may not be able to manage your superannuation.

We may sometimes collect information about you from third parties such as your employer, a previous super fund, your financial adviser, our related entities and publicly available sources.

We may disclose your information to various organisations in order to manage your super, including your employer, our professional advisors, insurers, our related companies which provide services or products relevant to the provision of your super, any relevant government authority that requires your personal information to be disclosed, and our other service providers used to assist with managing your super.

In managing your super your personal information will be disclosed to service providers in another country, most likely to Mercer's processing centre in India. Our Privacy Policies list all other relevant offshore locations.

Our Privacy Policies set out in more detail how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact us on 1300 368 891 or write to our Privacy Officer, PO Box 8334, Woolloongabba Queensland 4102

Step 5 – Sign the form

By signing this form I:

- authorise you to make the changes noted on this form in respect to the information provided in Steps 2,3 and 4
- understand my personal details cannot be updated unless the necessary supporting documentation is provided
- understand and consent to my information being collected, disclosed and used in the manner set out in this form.
- acknowledge that if I've provided my email address details and/or mobile number in this form, the Trustee may, at its discretion, use that email address and/or mobile number to send information, including any member and exit statements and notices of any material changes or the occurrence of significant events, by electronic means.

Signature

X

Date

/ /

Please return your completed form to: Mercy Super, PO Box 8334, Woolloongabba, QLD, 4102

