

Pension Application Form

Acclaim Core Pension

Acclaim
WEALTH



Before signing this Member Application Form, please ensure that you have read the latest Acclaim Core Super & Pension Product Disclosure Statement (PDS) and the current Additional Information Booklet (AIB), available from www.acclaimwealth.com.au or on request by phoning 1300 264 264. A reference to the 'member' in this form is a reference to the applicant for a pension from the Fund. Any application is subject to acceptance by the Trustee.

Note: A copy of member's ID (driver's license, passport or equivalent) is required to be submitted with this form.

Section 1: Personal details (all fields are mandatory)

Surname:	<input type="text"/>	Salutation:	<input type="text"/>
Given name(s):	<input type="text"/>		
Date of birth:	<input type="text"/>	Gender:	<input type="text"/>
Postal address:	<input type="text"/>		
Suburb:	<input type="text"/>	State:	<input type="text"/>
	<input type="text"/>	Postcode:	<input type="text"/>
Residential address:	<input type="text"/>		
Suburb:	<input type="text"/>	State:	<input type="text"/>
	<input type="text"/>	Postcode:	<input type="text"/>
Telephone (BH):	<input type="text"/>	(AH):	<input type="text"/>
	<input type="text"/>	Mobile:	<input type="text"/>
Email address:	<input type="text"/>		

Would you like your username and password for online access automatically emailed to this email? Yes No

I would like to receive electronic correspondence from the Fund, where applicable, to the email address provided. Yes No

Tax file number: **To be submitted via online portal ONLY** See the PDS and AIB for important information about the TFN declaration

Please note: If you are under the age of 60, you should also supply a standard TFN declaration form.

Citizenship details:
(Please tick one of the following)

<input type="checkbox"/>	I am an Australian citizen	<input type="checkbox"/>	I am a permanent resident of Australia
<input type="checkbox"/>	I am a New Zealand citizen	<input type="checkbox"/>	I hold a Subclass 405 or Subclass 410 temporary visa

Section 2: Type of pension

Please select the pension you are applying for: Account Based Pension (proceed to Section 3.1) Transition to Retirement Pension (proceed to Section 3.2)

Section 3: Eligibility

3.1 Account based pensions:
(Please tick one of the following)

<input type="checkbox"/>	I am aged 65 or over	<input type="checkbox"/>	I have reached my preservation age and am permanently retired
<input type="checkbox"/>	I am aged 60 or over, am not permanently retired and have terminated an employment arrangement	<input type="checkbox"/>	I am permanently incapacitated

3.2 Transition to retirement pensions:
(Please tick to confirm)

<input type="checkbox"/>	I have reached my preservation age, and am engaged in gainful part-time or full-time employment (i.e. employed at least 10 hours per week)
--------------------------	--

Section 4: Funding your pension

How will you be funding your pension? Please tick **all** applicable sources.

I would like to use funds from my Acclaim Core Super accumulation account. Account number:

How much money do you want to transfer to your pension account? Full balance

Partial balance, please specify:

If you are applying for a Transition to Retirement Pension you will need to maintain a minimum balance of \$6,000 in your accumulation account.

I would like to transfer funds from another superannuation provider.

Will this rollover include off-market transfer of shares? Yes – Please specify approximate value: \$ No

If you are transferring funds from another superannuation provider you must complete a *Request to Transfer* form which is available on our website www.acclaimwealth.com.au.

I would like to make an additional voluntary contribution.

Yes – Please complete a *Member Voluntary Contribution* form which is available on our website www.acclaimwealth.com.au.

If you are aged between 65 and 74 you must complete a *Work Test or Work Test Exemption Declaration* form which is available on our website www.acclaimwealth.com.au.

If none of the above options apply to you, please call us on 1300 264 264.

Section 5: Pension payment options

Please be advised that I wish for my pension payments to commence in the month of:

I nominate pension payments to be: Monthly Quarterly Half-yearly Yearly

I nominate pension payments to be: Minimum amount* Maximum amount* Actual amount: \$ per annum per month

*A maximum amount can only be specified for a Transition to Retirement Pension. Pension payments must meet government standards. We reserve the right to adjust your nominated pension payment so that government standards are met. From time to time, the minimum amount prescribed by law may change. For up to date information about the minimum, contact the Administrator on 1300 264 264 or go to www.acclaimwealth.com.au.

Section 6: Banking details (for pension payments)

Please provide your banking details if you would like your cash payment deposited directly into your account, otherwise we will post a cheque to you.

Please note that the account must be held in your name or jointly in your name.

Please also supply with your application form a bank document that displays the name of the account holder, BSB and account number. This document must be on bank letterhead or a statement.

BSB: Account number:

Account name:

Section 9: Investment choice

Please direct us as to the proportion of your initial investment and rollover that you would like invested in each investment option. These proportions will also apply to any further contributions or rollovers received for you.

Please note:

- Please refer to the AIB for further information regarding the available Investment Options.
- If no allocation has been nominated, AMG Cash option (the pension product's default option) will apply.

AMG Investment Options	Allocation %
AMG Index Diversified Options	
AMG Index Conservative	
AMG Index Balanced	
AMG Index Growth	
AMG Index High Growth	
AMG Index Sector Options	
AMG Index Fixed Interest	
AMG Index Listed Property	
AMG Index Australian Equities	
AMG Index International Equities	
Other Options	
AMG Cash	
	TOTAL 100%

Section 10: Identity verification

To make payments to you from your pension account we must verify your identity; you can supply us with an original certified copy of your photographic identification document via post, or you can submit with this form a scanned non-certified colour copy of your photographic identification. The Australian government's document verification service (DVS) has made the 'card number' a mandatory field to verify Australian drivers' licences. The card number is a unique number attributed to a driver's licence in Australia. If you are supplying a driver's licence as your form of identification, **please provide both the front and back of your licence** to ensure we can verify your identity.

If you supply us with a scanned copy of your identification we also need to electronically verify your identity. If you do not want us to identify you electronically please supply us with original certified copies of your identification via post. If you have any questions around this process please contact us on 1300 264 264.

When you opt for electronic verification, the details of the documents you provide to us will be submitted to the DVS. The DVS is a national online system that allows organisations to compare an individual's identifying information with a government record. Information about their privacy policy is available from their website: <http://www.dvs.gov.au>.

If you would like to proceed with electronic verification please tick each of the consent boxes below:

You consent to us electronically verifying your identity; AND

You are authorised to provide the identification documents to us; AND

You understand that the details of the identification documents will be checked against the Australian government's document verification service.

Please note that we are unable to make any payment until your identity has been verified either by this method, or by receiving a certified original copy of your identification by post.

We are unable to electronically verify identity documents issued from overseas. If you only have foreign identity documents please send us a certified original copy of your documents, accompanied by a translation document from an accredited translator if necessary, via post. For more information around this please contact us on 1300 264 264.

Section 11: Member declaration

I make the following declarations and acknowledgements:

General

- I understand that I am bound by the provisions of the Trust Deed for the Fund dated 12 May 2000 as amended from time to time.
- I have been provided a copy and have read and understood the relevant PDS and have obtained, read and understood the current AIB including any terms and conditions and, any investments in the Fund (including the Fund's investment options).
- I acknowledge that I have read and understood the information about contributions contained in the AIB and that I have satisfied myself that any contributions made by me are consistent with the contribution rules prescribed by superannuation legislation.
- I agree to indemnify the Trustee against all losses, actions, liabilities, claims and expenses incurred by or on behalf of the Trustee, directly or indirectly, in relation to the Trustee (or a person acting on behalf of the Trustee including, but not limited to, the Trustee's directors, employees or service providers) acting upon the directions, instructions, requests and other communications given or transactions made by me.
- The information I have provided in this form is true and correct.

Pension

- I understand that the pension I selected may not provide me with pension payments for the rest of my life, and that payments will cease once my account balance reduces to zero.
- I understand that if I commute my pension after joining (e.g. within a few years after joining) the value of my benefit may be less than I paid in.
- 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 the Trustee cannot provide me with advice about this and that I should consult an appropriately qualified adviser for advice that relates to my personal circumstances.
- In relation to a pension commenced (and continuing to be paid) under transition to retirement rules, I understand that additional restrictions apply to such pensions and that the tax treatment of such pensions has significantly changed from 1 July 2017.

Personal information

- I acknowledge that I have read and understood the Privacy Policy described in the AIB.
- I acknowledge that I have read and understood the information about quotation of tax file numbers contained in the PDS and AIB.

Investment

- I understand that my account balance can rise and fall, and that neither the Trustee, nor any of its directors, Acclaim Management Group Limited, nor any of its directors, guarantee the performance of the Fund or its investment options.
- I acknowledge that the Trustee will invest my account in accordance with the selections made by myself in this form and (where applicable) in any *Investment Choice* form (as varied by me, from time to time) but that the Trustee reserves the right not to do so where necessary or appropriate without liability to the Trustee.
- I hereby direct the Trustee to invest my account balance as indicated above, based on the declarations and acknowledgements made in this form.
- Where I have selected (or select) an illiquid investment, I acknowledge and accept that a period of longer than 30 days may be required to facilitate redemption or switching requests due to the illiquid nature of the investment.

Member signature:

Date:

Please return this completed form to Acclaim Wealth PO Box 3528, Tingalpa DC Qld 4173 or email to info@acclaimwealth.com.au.

Phone: 1300 264 264 Fax: (07) 3899 7299 Website: www.acclaimwealth.com.au

We are committed to respecting the privacy of the personal information you give us.

Our formal Privacy Statement sets out how we do this. If you would like a copy of Acclaim Wealth's Privacy Statement, please let us know. We have published our Privacy Statement on our website at www.acclaimwealth.com.au.

The Trustee's privacy policy can be found at www.eqt.com.au/global/privacystatement.