

# Bendigo SmartOptions

## Change of Details Form



This form can be used for the following products:

- Bendigo SmartOptions Super<sup>®</sup>
- Bendigo SmartOptions Pension<sup>®</sup>

Use this form if you wish to advise Sandhurst of changes to your account details (including applying a one-off Member Advice Fee or changing your ongoing Member Advice Fee(s) as negotiated with your financial adviser).

Please complete in **black** or **blue** ink using **CAPITAL LETTERS** (except for email addresses) and where provided, mark answer boxes with an **X**.

### Step 1 Current member details

**Important note:** If you do not complete all parts of this section and we are unable to verify your identity, we may request that you provide certified proof of identification.

Member number

Title  Surname

Given name(s)

Date of birth  /  /  Email

Employer name

### Step 2 Change of name (if applicable)

To action your request, you must supply supporting documentation. Please refer to the 'Proof of identity requirements' section below.

#### New name

Title  Surname

Given name(s)

I confirm I have enclosed certified copies of the required identification documentation.

#### Proof of identity requirements

Please enclose one of the following change of name documents:

- A **certified copy** of my marriage certificate issued by the Registry of births, deaths and marriages; or
- A **certified copy** of my change of name certificate; or
- A **certified copy** of my marriage certificate and Decree Nisi (Divorce Papers).

#### AND

One of the following primary identification documents issued in my name:

- A certified copy of my driver's licence issued under State or Territory law; or
- A certified copy of my passport

#### OR

One of the following documents (original certified copies):	AND	One of the following documents:
<ul style="list-style-type: none"><li>• birth certificate or birth extract</li></ul>		<ul style="list-style-type: none"><li>• letter from Centrelink regarding a Government assistance payment; or</li></ul>
<ul style="list-style-type: none"><li>• citizenship certificate issued by the Commonwealth; or</li></ul>		<ul style="list-style-type: none"><li>• notice issued by Commonwealth, State or local council within the past twelve months that contains your name and residential address.</li></ul>
<ul style="list-style-type: none"><li>• pension card issued by Centrelink that entitles the person to financial benefits.</li></ul>		For example: <ul style="list-style-type: none"><li>- Tax Office Notice of Assessment</li><li>- Rates notice from local council.</li></ul>

### Certification of personal documents

All copied pages of ORIGINAL proof of identification documents need to be certified as true copies by any individual approved to do so. The person who is authorised to certify documents must:

- sight the original and the copy and make sure both documents are identical;
- make sure all pages have been certified as true copies by **writing** or **stamping** 'certified true copy' followed by their **signature, printed name, qualification** (eg Justice of the Peace, Australia Post employee, etc) and **date**.

**A list of people who can certify a copy of an original document is available at [sandhursttrustees.com.au/super-forms](http://sandhursttrustees.com.au/super-forms).**

### Step 3 Change of contact details (if applicable)

You can change your residential address online by logging into our secure website at [www.sandhursttrustees.com.au/SmartOptions](http://www.sandhursttrustees.com.au/SmartOptions), or by contacting us on 1800 033 426 instead of completing this form. However, you must use this form to change your PO Box or C/- address.

#### Previous residential address

Address

Town/Suburb  State  Postcode

#### New residential address

Address

Town/Suburb  State  Postcode

#### New postal address (if different from residential address)

Address

Town/Suburb  State  Postcode

#### New phone number(s)

Work phone number  Mobile

Home Phone number

New email address

### Step 4 Pension payments (if applicable)

Please change my pension payment to:

Frequency:  Monthly  Quarterly  Half Yearly  Yearly

Pension Amount:  Minimum  Maximum (Transition to retirement members only)  Other Amount

Complete the following details only if you have selected 'Other Amount' from above:

Amount \$  Indexation Rate  %

Only complete this section if you wish to change the bank account in which your pension payments are being received.

Name of Bank

Branch Address

Town/Suburb  State  Postcode

Account Name

BSB number  Account number

Important Note: We require five business days to action your request. If we have not received your request in time to alter your next scheduled payment, your alteration will take effect from the following payment.

## Step 5 Change of Member Advice Fee (if applicable)

Only complete this section if you have negotiated advice fee(s) with your financial adviser. If there is a change of financial adviser (or you no longer have a financial adviser), we will cease paying the agreed Member Advice Fee(s) to the financial adviser via his/her dealer group until you instruct us otherwise.

<input type="checkbox"/>	Apply Member Advice Fee - One off to \$	<input type="text"/>	,	<input type="text"/>	.	<input type="text"/>	(max \$10,000 inclusive of GST per request)
<input type="checkbox"/>	Apply or change Member Advice Fee - Ongoing to \$	<input type="text"/>	,	<input type="text"/>	.	<input type="text"/>	(max \$10,000 p.a. inclusive of GST)
			or	<input type="text"/>	.	<input type="text"/>	% (max 2.2% p.a. inclusive of GST of your account balance)

### AND/OR

<input type="checkbox"/>	Apply or change Member Advice Fee - Insurance to \$	<input type="text"/>	,	<input type="text"/>	.	<input type="text"/>	(max \$10,000 p.a. inclusive of GST)
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### OR

<input type="text"/>	.	<input type="text"/>	% (max 50% p.a. inclusive of GST) of your insurance premium for each type of insurance cover
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Note: All figures should be inclusive of GST.

Adviser name

Adviser signature

Date

 /  / 

Member signature

Date

 /  / 

## Step 6 Member declaration

- I have read and understood Bendigo and Adelaide Bank Group's Privacy Policy which is available at [www.sandhursttrustees.com.au](http://www.sandhursttrustees.com.au) and agree that Sandhurst and Bendigo and Adelaide Bank Group may collect, use and disclose my personal information in accordance with the Privacy Policy.
- I authorise the above changes to be made to my membership details.
- In respect of electronic instructions (email, fax) in relation to this request, I agree and acknowledge that Sandhurst:
  - Will not accept electronic instructions unless it is accompanied by my scanned or faxed signature;
  - Is not responsible for any loss or delay that results from a transmission not being received by Sandhurst;
  - Will only process my electronic instructions if they are received in full and have been fully signed by me;
  - Will not accept a receipt confirmation from the sender's facsimile machine or computer as evidence of receipt of the instructions;
  - Will not compensate you for any losses relating to electronic instructions, unless required by law; and
  - Does not take responsibility for any fraudulent or incorrectly completed electronic instructions. In the event of fraud, I agree to release Sandhurst from, and indemnify Sandhurst against, all losses and liabilities whatsoever arising from Sandhurst acting in accordance with any instructions received electronically bearing your member number and a signature purportedly mine.

Member Signature

Date

 /  / 

Previous Signature (if your signature has changed due to a change of name)

### Contact details:

Sandhurst Trustees Limited

Bendigo SmartOptions

GPO Box 529

Hobart Tasmania 7001

Phone: 1800 033 426

Fax: 03 6215 5800

Email: [superannuation@bendigobank.com.au](mailto:superannuation@bendigobank.com.au)

Website: [www.sandhursttrustees.com.au/SmartOptions](http://www.sandhursttrustees.com.au/SmartOptions)

**Note: If you are advising us of a change of name, please send us your request along with all supporting documentation by post. Change of name requests received via fax or email will not be accepted.**