

## PENSION REFRESH FORM

Complete this form if you wish to refresh your Grosvenor Pirie Super pension account by rolling it back into your existing Grosvenor Pirie Super accumulation account, or a pre-pension holding account, before adding additional funds via contributions or rollovers, and then establishing a new Grosvenor Pirie Super pension account.

You can find detailed information about the Grosvenor Pirie Super - Pension Division in our Product Disclosure Statement (PDS), Financial Services Guide and Privacy Policy, all of which can be obtained from [www.gpml.com.au](http://www.gpml.com.au) or on request by phoning **(02) 8355 5149**.

This form must be posted to [Grosvenor Pirie Super PO BOX 1282, Albury NSW 2640](#).

### Section 1 Personal Information

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Given Name(s)	<input type="text"/>		
Surname	<input type="text"/>		
Date of Birth	<input type="text"/>		
Mobile Phone Number	<input type="text"/>		
Email Address*	<input type="text"/>		
Residential Address	<input type="text"/>		
	<input type="text"/>		
Suburb	<input type="text"/>	State	<input type="text"/>
		Postcode	<input type="text"/>

\* By providing your email address, you consent and authorise us to send you communications or information, including information required by law, via email or similar technologies. Your details will never be passed onto a third party other than in accordance with our Privacy Policy. You can elect to receive communications by post at any time by contacting Grosvenor Pirie Super on **(02) 8355 5149** or via email at [members@gpml.com.au](mailto:members@gpml.com.au) or in writing at [Grosvenor Pirie Super, 120B Underwood St, Paddington NSW 2021](#).

### Section 2 Pension Account Instructions

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Current account information	
Member Number	<input type="text"/>
Pension Account Number	<input type="text"/>
Accumulation Account Number If applicable	<input type="text"/>

With reference to the accounts named above, please select **one** of the following options:

I wish to roll my Grosvenor Pirie Super pension account back to my Grosvenor Pirie Super accumulation account so that I can use the consolidated balance to start a new pension account without making any additional contributions or rollovers.

I wish to roll my Grosvenor Pirie Super pension account back to my Grosvenor Pirie Super accumulation account, make some additional contributions\* or rollovers<sup>^</sup>, and then use the consolidated balance to start a new pension account.

I do not have a Grosvenor Pirie Super accumulation account. I wish to roll my Grosvenor Pirie Super pension account to a pre-pension holding account<sup>#</sup>, so that I can make some additional contributions or rollovers, and then use the consolidated balance to start a new pension account.

\* If you wish to make a personal contribution into your Grosvenor Pirie Super accumulation account, please complete a [Personal and Spouse Contributions Form](#) available from [www.gpml.com.au](http://www.gpml.com.au).

<sup>^</sup> If you wish to rollover one or more accounts with other superannuation funds into your Grosvenor Pirie Super accumulation account, please complete a [Rollover Form](#) available from [www.gpml.com.au](http://www.gpml.com.au) for each account that you are rolling over.

<sup>#</sup> If you currently do not have an accumulation account with Grosvenor Pirie Super, and wish to make additional contributions or rollovers, and then re-open a Grosvenor Pirie Super pension account, we will open a temporary Grosvenor Pirie Super accumulation account in your name in order to receive these funds. These amounts will be held in cash in your temporary account until all rollovers or amounts intended for the purchase of the Grosvenor Pirie Super pension have been received. If this option applies to you, please contact us on [\(02\) 8355 5149](tel:0283555149) for more information.

After these steps have been completed, please establish a new Grosvenor Pirie Super pension account with:

The entire balance of my Grosvenor Pirie Super accumulation account.\*

I wish to rollover \$  from my Grosvenor Pirie Super accumulation account.<sup>^</sup>

\* If you withdraw your entire account balance, any insurance cover you hold through your account will cease and your account will be closed.

<sup>^</sup> You need a minimum of \$20,000 to start a Grosvenor Pirie Super pension account. You must leave at least \$200 in your Grosvenor Pirie Super accumulation account for it to remain open. This option does not apply to members for whom a pre-pension holding account has been established.

### Section 3 Investment Selection

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By completing this form, you hereby direct the Trustee to invest **100% of the balance of your Grosvenor Pirie Super pension account** into the Grosvenor Pirie Super Pension investment option.

### Section 4 Condition of Release

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Superannuation law requires that you must meet a condition of release to be eligible to access your super via a pension. Please tick the box below which best describes your situation.

I have reached my preservation age<sup>\*</sup>, have ceased employment and permanently retired<sup>#</sup> from the workforce.

I am at least 60 years of age and I have changed jobs or ceased gainful employment<sup>#</sup> since attaining age 60.

I am at least 65 years of age.

\* See the Preservation Age Table in the Grosvenor Pirie Pension Product Disclosure Statement available at [www.gpml.com.au](http://www.gpml.com.au) or on request by phoning [\(02\) 8355 5149](tel:0283555149).

<sup>#</sup> '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.

## Section 5 Payment Instructions

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Your first payment will generally be made on the 15<sup>th</sup> of the month following the month that we receive your completed application. We will confirm your payment start date once your pension has been established.

Please indicate how frequently you wish to receive a pension payment:

Monthly

Quarterly

Annually

Please indicate the amount you wish to withdraw as part of each pension payment:

The minimum allowable payment.

A specific amount of \$  per payment.

## Section 6 Bank Account Details

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Account Name \*

Name of Financial Institution

BSB

Account Number

\* We can only make payments into an Australian bank, credit union or building society account that's in your name or held jointly in your name with other person(s).

## Section 7 Verification of Identity

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Please select one of the two options below.

Option 1 - I want to attach paper copies of certified ID.

Please ensure that you provide photocopies of at least two of the following - Australian Passport, Australian Drivers' Licence, Medicare Card. Each page must be certified as a true copy.

If the documents you provide are not correctly certified or are unable to be read, you authorise us to validate your identity and perform an anti-money laundering and counter terrorism financing check using a third party id validation provider, including confirming your document is valid with the original document issuer.

Option 2 - I want to use electronic verification.

By providing the information below, you authorise us to validate your identity and perform an anti-money laundering and counter terrorism financing check using a third party id validation provider, including confirming your document is valid with the original document issuer.

You must provide **at least two** of the following (if you are unable to provide this information you will need to provide certified ID as per option 1).

**Australian Passport** Please complete the details exactly as they appear on your Passport

Passport number	<input type="text"/>	First Name	<input type="text"/>
Last Name	<input type="text"/>	Date of Birth	<input type="text"/>
Sex	<input type="text"/>		

**Medicare Card** Please complete the details exactly as they appear on your card

Card number	<input type="text"/>	Reference number	<input type="text"/>
First Name	<input type="text"/>	Last Name	<input type="text"/>
Date of Birth	<input type="text"/>	Card Expiry date	<input type="text"/>

**Australian Drivers Licence** Please complete the details exactly as they appear on your Licence

Licence number	<input type="text"/>	State of issue	<input type="text"/>
First Name	<input type="text"/>	Last Name	<input type="text"/>
Date of Birth	<input type="text"/>		

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**Section 8 Reversionary Beneficiary**

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If you wish to nominate a reversionary beneficiary, being a person that will continue to receive your pension payments as an income stream in the event of your death, you must do this at the time of opening your Grosvenor Pirie Super pension account. Please complete the [Nomination of Reversionary Beneficiary Form](#) available from [www.gpml.com.au](http://www.gpml.com.au) or on request by phoning **(02) 8355 5149**.

**Section 9 Declaration and Signature**

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By completing this form, I declare that:

- All the details I have provided in this application form are true and correct.
- I have made an informed decision because I have read and understood the PDS and all related documents to which this application applies.
- No representations have been made to me by or on behalf of Grosvenor Pirie Super other than those contained in the PDS.
- I accept that I will be bound by the provisions of the trust deed and rules which govern the operation of Grosvenor Pirie Super.
- I have read and understood the Privacy Statement and understand how Grosvenor Pirie Super will use my personal information.
- By providing my email address, I consent and authorise Grosvenor Pirie Super to send communications or information, including information required by law, to me via email or similar technologies.
- If I have provided my TFN, I have read and understood the important information about my TFN in the PDS and consent to providing my TFN for the legal purposes stated.
- I understand the nature of the risks attached to the investment I am applying for and acknowledge that neither Grosvenor Pirie Super, nor the Trustee of the Fund, guarantee a return of capital or the performance of my investment.

I consent to Responsible Investment Services Pty Ltd (ABN 77 630 578 200; AFS Representative No. 001271438), a Corporate Authorised Representative of True Oak Investments Ltd (ABN 96 009 266 639; AFS Licence No. 238184), receiving a Promoter Fee from Grosvenor Pirie Super that is a portion of the management fees (being the total fees and costs charged to members of Grosvenor Pirie Super) equal to the balance of the total management fee minus the investment and administration fees and the fund expense and operational risk reserves accrued in the calculation of the unit price. This fee is estimated to be between 0.3% and 0.5% of funds under management per annum.

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Signature

...../...../.....  
Date

.....  
Print Name

**PRIVACY STATEMENT:** By signing this form you consent to Grosvenor Pirie Super collecting and using your personal information to manage your superannuation account and to comply with the relevant legislation. If you do not provide this information, we may not be able to accurately manage your superannuation account. Your personal information may be disclosed to other parties, including the Trustee, the Fund Promoter, the Fund's Administrator, the Fund's Insurer and professional advisers, government bodies and the trustee of any other fund to which you transfer. To access your personal information or for a copy of our Privacy Policy, visit [www.gmpl.com.au](http://www.gmpl.com.au) or phone (02) 8355 5149.