

Instructions

You should not complete this form unless you have received, read and understood the current Bank First Superannuation Product Disclosure Statement (PDS) and relevant fact sheets.

- Black or blue pen please.
- Please use BLOCK letters.
- Please place a X in boxes where required.

Please send us your request, along with certified copies of any supporting documents requested to the following address:

Bank First Superannuation
GPO Box 4559
Melbourne VIC 3001

Step 1 – Member details

Member Number

Title

First Name

Last Name

Email address

Date of Birth

Phone number (mobile)

Step 2 – Type of change required

Date of birth

Insurance

Step 3 – Date of birth correction details

Correct Date of Birth

Note: please attach supporting documentation – eg: certified copy of birth certificate, license or passport. If certified copies of documents are not provided we will be unable to process your request. Please see 'Important notes' below for who can certify copies.

Step 4 – Insurance cancellation request

Please mark this box to cancel the insurance provided by Bank First Superannuation. You will cease to be insured from the date we process your request.

Please note: If you cancel your insurance you will not be able to reinstate it later if you change your mind or your personal circumstances change.

Step 5 – Declaration and authorisation

- I declare that I am the person named on this form or have a current valid power of attorney to act on the member's behalf (please send certified copy of power of attorney if applicable)
- I declare I have obtained, read and understood the current PDS and fact sheets which are incorporated into the PDS
- I declare that I have fully read this form and the information completed is true and correct
- I authorise the Trustee to update the relevant records as instructed on this form

Signature

Date

Important notes

Certified Identification documents

As a result of legal and other requirements, we require verification of the identity of members in certain circumstances including where a change of member details is requested, to safeguard member benefits. The safest and quickest option is to provide certified proof of identity. Any documents you provide must be certified as true copies by a person authorised to certify documents.

Below is a list of documents that we will accept.

A certified copy of one of the following documents ONLY:

- Driver's licence issued under State or Territory law
- Australian Passport
- Card issued under a State or Territory law, for the purpose of proving a person's age, containing a photo
- Foreign passport that contains a photo and the signature of the member (and translated by an accredited translator if in a foreign language)

OR

A certified copy of one of the following documents:

- Birth certificate issued by a State or Territory
- Citizenship certificate issued by the Commonwealth
- Pension card or health card issued by Centrelink that entitles the person to financial benefits

AND

A certified copy of one of the following documents:

- A social security notice issued by the Commonwealth, State or Territory in the past 12 months containing your name and residential address which records financial benefits provided to you
- Notice issued by the Australian Tax Office within the past twelve months that contains your name and residential address and records debt payable by you
- A Rates or Utilities notice issued in the last 3 months containing your name and residential address and recording the provision of services to you/your address

Make sure your documents are correctly certified:

All copied pages of ORIGINAL supporting documents or proof of identity documents need to be certified as true copies by an individual approved to do so. They must:

- Sight the original and the copy and make sure both documents are identical, then
- Make sure all pages have been certified as true copies by writing or stamping 'certified true copy', then

Sign, print their name, qualification (eg, Justice of the Peace etc) and date.

People commonly used to certify proof of identity documents:

- a person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner (however described);
- a Judge of a court;
- a Magistrate;
- a Chief Executive Officer of a Commonwealth court;
- a Registrar or Deputy Registrar of a court;
- a Justice of the Peace;
- a Notary Public (for the purposes of the Statutory Declaration Regulations 1993);
- a Police Officer;
- an agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public;
- a permanent employee of the Australian Postal Corporation with 2 or more years of continuous service who is employed in an office supplying postal services to the public;
- an Australian consular officer or an Australian diplomatic officer (within the meaning of the Consular Fees Act 1955);
- an officer with 2 or more continuous years of service with one or more financial institutions (for the purposes of the Statutory Declaration Regulations 1993);
- a finance company officer with 2 or more continuous years of service with one or more finance companies (for the purposes of the Statutory Declaration Regulations 1993);
- an officer with, or authorised representative of, a holder of an Australian financial services licence, having 2 or more continuous years of service with one or more licensees;
- a member of the Institute of Chartered Accountants in Australia, CPA Australia or the National Institute of Accountants with 2 or more years of continuous membership;
- an officer with, or authorised representative of, a holder of an Australian Credit Licence having at least 2 continuous years of service with one or more licensees.

For information about other people that certify proof of identity documents, call (03) 9654 1399.