

Pension Payment Details

You can use this form to establish or amend pension payment details.

Section A: Personal Details

Portfolio Number (Account Number eg. IQ1234567)

Family Name

First Given Name

Other Given Names

Date of Birth

Residential Address

Suburb

State

Postcode

Country if Outside of Australia

IconiQ Super Wrap

A Division of WRAP Super ABN 18 906 079 389

GPO Box 1657, Melbourne VIC 3001 P: 1300 746 454 E: clientsupport@iconiqwrap.com.au USI 18906079389002

Issued by the Trustee of WRAP Super:

Equity Trustees Superannuation Limited ABN 50 055 641 757 AFS Licence No 229757 RSE Licence No L0001458

Section B: Pension Payment Details

Should you change your requested pension payment amount within a financial year, we will take into account any previous amount paid to you from IconiQ Super Wrap in that financial year.

Please note that twice monthly pension payments will be made on the 10th and 24th days of the applicable month. All other pension payments will be made on the 10th day of the applicable month.

Payment amount

I nominate pension payments to be: (please tick one)

- ☐ Minimum Amount
- ☐ Nominated Amount Per Frequency (\$) *
- ☐ Maximum Amount (Transition to Retirement (TTR) Pensions Only)

*If the nominated amount entered does not fall within the required minimum and maximum (for TTR Pensions) amounts, we will adjust it accordingly. Refer to the IconiQ Super Wrap Product Disclosure Statement for further information.

Payment frequency

I nominate payment frequency to be: (please tick one)

- ☐ Twice Monthly
- ☐ Monthly
- ☐ Quarterly
- ☐ Half-Yearly
- ☐ Annually

Effective From (insert date below)

D

D

M

M

Y

Y

Y

Y

Section C: Additional Options

When you commence your pension with IconiQ Super Wrap, we'll automatically pro-rata the nominated amount based on the number of days remaining in this financial year.

- ☐ Tick this box should you wish to opt-out of this approach and receive the nominated full amount

If you are joining IconiQ Super Wrap in June, you have the option to not take a pension payment until the new financial year.

- ☐ Tick this box if you would like to wait until the new financial year to commence to receive the pension payments.

Section D: Bank Account Details

This section can be left blank if you are already receiving your IconiQ Super Wrap pension payments into your selected bank account.

Please pay my pension payments into the bank account listed below:

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

Account Name

Name of Bank/Financial Institution

BSB

Account Number

Section E: Privacy & Declaration

Privacy

When you provide instructions by completing this form, personal information about you is being collected. Information about how the Trustee collects, uses and discloses your personal information is set out in the Trustee’s Privacy Policy available at www.eqt.com.au.

Declaration

I declare and understand that:

- the information provided on this form is true and correct, and I authorise the changes to be made;
- if the information provided in this form is not correct or verifiable, this form may not be processed, or I may be requested to provide additional information;
- I authorise the Trustee to make the changes noted on this form; and
- I have read the Trustee’s Privacy Statement, and understand how my personal information will be collected and used.

Full Name of Member

Signature

Date

DDMMYYYY

Section F: Identification Requirements

Identification for all pension payment requests

Please supply a certified copy of your identification documents to support your benefit payment request. If you are unable to provide documentation from the primary identification list, we can also accept two forms of secondary documentation as outlined below.

Note: On a current document, certified identification is valid for 24 months, after which new certification documents are required.

Primary Identification Requirements

A certified copy of one of the following:

- ☐ Current Australian driver’s licence or foreign equivalent that includes your photo and signature.
- ☐ An Australian passport or foreign equivalent that includes your signature (may be current, or expired within 2 years).
- ☐ An identity card issued by a State or Territory Government that includes your photo.

Secondary Identification Requirements

Should you be unable to provide a primary identification document from the list above, please provide one certified document from Column A and one certified document from Column B.

Column A	Column B
☐ Australian birth certificate	☐ A document issued by the Commonwealth or a State or Territory within the preceding 12 months that records the provision of financial benefits to you and which contains your name and residential address.

☐ Australian citizenship certificate	☐ A document issued by the Australian Taxation Office within the preceding 12 months that records a debt payable by you to the Commonwealth (or by the Commonwealth to you), which contains your name and residential address. Please block out your TFN before providing this document.
☐ Pension card issued by the Department of Human Services	☐ A document issued by a local government body or utilities provider within the preceding 3 months which records the provision of services to you or your address (the document must contain both your name and address).

Who can certify your documentation

Your documentation can be certified by any of the following individuals:

- A person who is licensed or registered to practice in one of the following occupations:
 - Chiropractor
 - Dentist
 - Legal practitioner
 - Medical practitioner
 - Nurse
 - Optometrist
 - Patent attorney
 - Pharmacist
 - Physiotherapist
 - Trade marks attorney
 - Veterinary surgeon
- 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)
- Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
- Bailiff
- Bank officer with 2 or more continuous years of service
- Building society officer with 2 or more years of continuous service
- Chief executive officer of a Commonwealth court
- Clerk of a court
- Commissioner for Affidavits
- Commissioner for Declarations
- Credit union officer with 5 or more years of continuous service
- Employee of the Australian Trade and Investment Commission who is:
 - a. in a country or place outside Australia; and
 - b. authorised under paragraph 3 (d) of the Consular Fees Act 1955; and
 - c. exercising his or her function in that place
- Employee of the Commonwealth who is:
 - a. in a country or place outside Australia; and
 - b. authorised under paragraph 3 (c) of the Consular Fees Act 1955; and
 - c. exercising his or her function in that place
- Fellow of the National Tax Accountants' Association
- Finance company officer with 2 or more years of continuous service
- Holder of a statutory office not specified in another item in this Part
- Judge of a court
- Justice of the Peace
- Magistrate
- Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961
- Master of a court
- Member of Chartered Secretaries Australia
- Member of Engineers Australia, other than at the grade of student
- Member of the Association of Taxation and Management Accountants
- Member of the Australian Defence Force who is:
 - a. an officer; or
 - b. a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with 2 or more years of continuous service; or
 - c. a warrant officer within the meaning of that Act
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the Institute of Public Accountants
- Member of:
 - a. the Parliament of the Commonwealth; or

- b. the Parliament of a State; or
 - c. a Territory legislature; or
 - d. a local government authority of a State or Territory
- Minister of religion registered under Subdivision A of Division 1 of Part IV of the Marriage Act 1961
- Notary public
- 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
- Permanent employee of:
 - a. the Commonwealth or a Commonwealth authority; or
 - b. a State or Territory or a State or Territory authority; or
 - c. a local government authority; with 2 or more years of continuous service who is not specified in another item in this Part
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- Police officer
- Registrar, or Deputy Registrar, of a court
- Senior Executive Service employee of:
 - a. the Commonwealth or a Commonwealth authority; or
 - b. a State or Territory or a State or Territory authority
- Sheriff
- Sheriff's officer
- Teacher employed on a full-time basis at a school or tertiary education institution
- Member of the Australasian Institute of Mining and Metallurgy
- An officer with, or authorised representative of, a holder of an Australian financial services licence, having 2 or more years of continuous service with one or more licensees
- An officer with, or a credit representative of, a holder of an Australian credit licence, having 2 or more years of continuous service with one or more licensees
- A person authorised as a notary public in a foreign country.

How to return this form

Provide to your Adviser

Provide this form to your Financial Adviser to upload on your behalf via the IconiQ portal (Portfolios > Reports & Documents > Submit Superannuation Documents).