

ClearView Pension Plan - Pension Variation form

Please complete this form using black ink and print well within the boxes in CAPITAL LETTERS. Please mark appropriate answer boxes with a cross ☒

Important: We must receive your request by the 5th day of the month if you require the changes to be effective for a pension payment due in the same month.

Any changes received after this date will not be guaranteed to be effective until the following pension payment is due.

Section A: Personal details

Account number

☒ Mr ☒ Mrs ☒ Miss ☒ Ms Other

Surname

Full given name(s)

Residential address (PO Box is NOT accepted)

Unit number Street number

Street name

Suburb

State Postcode

Country

Home phone number

Mobile phone number

Email address

Postal address (if different from above)

Unit number Street number PO Box number

Street name

Suburb

State Postcode

Country

You may change one or more of the following sections in relation to your pension:

Section B: Pension payment amount

Please change my annual pension payment amount to the following: (Please mark the appropriate box).

- ☒ Minimum allowable#
- ☒ Maximum allowable ('Ease Into Retirement' investors only)#
- ☒ Other amount (please specify) \$ per annum

Payments must meet the annual minimum pension payment requirements, however 'Ease Into Retirement' payments are also subject to a maximum annual pension payment.

The Product Disclosure Statement explains how this is calculated.

Section C: Indexation

Indexation to the Consumer Price Index (CPI). Indexation can only be selected on specified amounts. (Please mark the appropriate box).

- ☒ Yes – Index my pension to the CPI
Subject to the maximum allowable pension ('Ease into Retirement' investors only).
- ☒ No

Section D: Payment frequency

Please change my payment frequency to: (Please mark the appropriate box).

- ☒ Annually ☒ Quarterly ☒ Monthly

Commencing / /

Section E: Centrelink/Veterans' Affairs

Do you receive a Government Age Pension from Centrelink or the Department of Veterans' Affairs?

- ☒ Yes ☒ No

If yes, I receive the age pension from:

- ☒ Centrelink ☒ Department of Veterans' Affairs

Section F: Account details

Please change my account details for my pension payments to (refer to Section H for proof of identity requirements):

Type of institution (Please mark the appropriate box)

☒ Bank

☒ Building Society

☒ Credit Union

Name(s) of account holder(s) (The account must be either held in your name or jointly with another person/s).

Name of financial institution where account is held

Branch

Address of branch

BSB number

Account number

Section G: Payment options

Please change the investment options from which my pension payments are paid.

You may specify either the % from one or more investment options or the order of the investment options to be used, eg Conservative 1st, Cautious 2nd, Assertive 3rd, etc.

If you have not made a selection before, or if payment cannot be made on the basis of your last selection (if any), pension payments will be paid from the investment options in the order listed below under 'Default order of payment'.

Investment options

	Percentage	Order of payment ie. 1st, 2nd, 3rd	Default order of
Guaranteed Cash	<div>%</div>	<div></div>	<div>1</div>
Conservative	<div>%</div>	<div></div>	<div>2</div>
Cautious	<div>%</div>	<div></div>	<div>3</div>
Prudent	<div>%</div>	<div></div>	<div>4</div>
Assertive	<div>%</div>	<div></div>	<div>5</div>
Aggressive	<div>%</div>	<div></div>	<div>6</div>

The following options are available only to those who invested prior to 1 February 2002.

Managed Income	<div>%</div>	<div></div>	<div>7</div>
Diversified Stable	<div>%</div>	<div></div>	<div>8</div>
Diversified Balanced	<div>%</div>	<div></div>	<div>9</div>
Managed Growth	<div>%</div>	<div></div>	<div>10</div>
Diversified Growth	<div>%</div>	<div></div>	<div>11</div>
Australian Shares Growth	<div>%</div>	<div></div>	<div>12</div>
TOTAL	<div>100%</div>		

Section H: Proof of Identity

Proof of Identity information only required if adding or amending your financial institution account details in Section F.

☐

I have attached a certified copy of my driver's licence or passport.

OR

☐

I have attached certified copies of both:
Birth/Citizenship Certificate or Centrelink Pension Card
AND
Centrelink Payment letter or Government notice (less than one year old) with name/address.

If you are unable to meet the above 'Proof of Identity' requirements please contact us on 132 977.

Section I: Individuals declaration and signature

Required before any changes are processed

I consent to the collection, use and disclosure of my personal information as set out in the Our Privacy Policy section.

I understand:

- that if I do not provide all required information, my request will not be actioned;
- my request will be deemed to be received and will be actioned on the day ClearView receives all required information.

Signature

X

D

D

/

M

M

/

Y

Y

Our Privacy Policy

Further information on how we handle your personal information is explained in our Information Handling Policy including:

- how to contact us regarding Privacy;
- how to inform us to change your marketing consent; and
- how to access your personal information.

You can obtain a copy of our Information Handling Policy by calling us on 1800 265 744 or by visiting our website at clearview.com.au.

This form can be posted (no stamp required) to:
ClearView
Client Administration
Reply Paid 4232
Sydney NSW 2001

If you have any questions about this form, please call us on
132 977