



## Step 4 – Pension Payments

Choose one of the following options. To work out your minimum and maximum pension payment allowable each year, refer to page 34 of the PDS.

Minimum amount allowable each year, **OR**

Maximum amount allowable each year, **OR**

Specific amount desired each year: \$

The specific dollar amount must be at least equal to the minimum % amount permitted for your age.

**Please note, pension payments can only be made on a monthly basis and will commence in the month following submission of this application. Pension payments will be made on the 15th of each month.**

## Step 5 – Payment Instructions

Please pay my pension directly to the Bank, Credit Union or Building society account shown below:

Name of institution

Branch address

Account Name

Branch BSB No:

Account Number:

## Step 6 – Nominating Your Beneficiary(ies)

**Option 1 – Reversionary Beneficiary(ies). I instruct the Trustee to pay my death benefit to my Reversionary Beneficiary.**

1. Full name of dependant(s)

Address

Suburb

State

Postcode

Relationship to you

% of benefit

*Continued over*





## Step 6 – Nominating Your Beneficiary(ies) (continued)

Relationship to you

% of benefit

3. Full name of dependant(s) or legal personal representative(s)

Address

Suburb

State

Postcode

Relationship to you

% of benefit

Attach any additional dependant's or legal personal representative's details on a separate sheet and attach that sheet to this form.

## Step 7 – Attach Proof of Identity

For identification purposes, you **MUST** attach a **certified** copy of either your Driver's Licence or Passport (or acceptable alternatives). See the "Completing proof of identity" section in the PDS for details of certification and acceptable alternative documents.

Failure to provide appropriate proof of identification may result in delays in the processing of your pension payments.

## Step 8 – Sign the form

I declare as follows:

- I apply for admission as a Pension Section member of Goldman Sachs & JBWere Superannuation Fund upon the terms and conditions contained in the Trust Deed governing the Fund.
- I understand that my existing benefits (including my death and TPD benefits) may be reduced in accordance with the Fund's Trust Deed following the transfer of some or all of my existing Goldman Sachs & JBWere Superannuation Fund superannuation benefit to the Pension section in the Goldman Sachs & JBWere Superannuation Fund.
- I certify that the details provided by me on this form are true and correct.
- I acknowledge that caps apply to the amount I can transfer into the Retirement Phase and it is my responsibility to monitor.
- I have received, read and understood the privacy collection policy contained in the PDS.
- I confirm I have had the opportunity to obtain professional advice before completing this form.

Signature

Date

Return this completed form to:

**Goldman Sachs & JBWere Superannuation Fund**  
**C/- Fund Administrator**  
**GPO Box 4303 Melbourne VIC 3001**

