iQ Retirement

Russell Investments

Change Pension Payment Details Form

Use this form to change your pension payments. Print clearly in BLOCK LETTERS.

1. Member details

a. Title (please select)

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Dr ☐ Other ☐ >

b. Surname

c. First name(s)

d. Date of birth (DD MM YYYY)

e. Member number

f. If you have more than one Pension Account, you must identify the Pension Account to which your instructions on this form apply.

☐ I have one Pension Account. Please apply my instructions on this form to that account.

☐ I have more than one Pension Account.
Please apply the instructions on this form to the account number:

2. Pension payments

My new nominated pension payment is (tick one box only):

☐ **Minimum payment**
The minimum legislated amount, which is calculated as a percentage of the value of your Pension Account at the later of the last 1 July or the date you opened the Pension Account and pro-rated for remaining days in the year. If you open your Pension Account in the month of June, the minimum legislated amount for that tax year is zero and no payment would be made until the following financial year.

☐ **Specific dollar amount**
Specific annual dollar amount (before tax), pro-rated for remaining days in the year:

$ .00

☐ **Maximum payment (only applicable to members under age 65 and NOT retired)**
The maximum legislated amount which is calculated as 10% of the Pension Account balance at the later of the last 1 July or the date you opened the Pension Account. Note that the maximum pension payment is not pro-rated. For example, if you open your account in June, choose the maximum payment option and your maximum amount for the year is $12,000 your June payment will be $12,000.

Mark this box if applicable:

☐ **Please make my total maximum payment for this year in the next available monthly payment run.**

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IN PREPARING THIS FORM THE TRUSTEE HAS NOT TAKEN INTO ACCOUNT THE INVESTMENT OBJECTIVES, FINANCIAL SITUATION AND PARTICULAR NEEDS (FINANCIAL CIRCUMSTANCES) OF ANY PERSON. ACCORDINGLY, BEFORE ACTING ON ANY ADVICE, YOU SHOULD ASSESS WHETHER THE ADVICE IS APPROPRIATE IN LIGHT OF YOUR OWN FINANCIAL CIRCUMSTANCES.

TOTAL RISK MANAGEMENT PTY LIMITED ABN 62 008 644 353, AFSL NO. 238790, TRUSTEE OF THE RUSSELL INVESTMENTS MASTER TRUST ABN 89 384 753 567. R_P_IQ_F_CHPP_V1F_1711

2. Pension payments (continued)

Please note you must also make a selection below to indicate the frequency of payments for future years.

My pension should be paid (and pro-rated accordingly, if applicable) as follows (tick one box only):

☐ **Monthly**
Please make the monthly payment on or around the 15th of each month.

☐ **Quarterly**
Please make the monthly payment on or around the 15th of September, December, March and June.

☐ **Semi-annually**
Please make the monthly payment on or around the 15th of the next December and June.

☐ **Annually**
Please choose one of the below. If you do not select an option the default will be June.

- ☐ Please make the annual payment on or around the 15th of June.
- ☐ Please make the annual payment on or around the 15th of July.

3. Authorisation

If you have a financial adviser it is important that you consult them prior to effecting changes to your account. If you have consulted your adviser regarding this change or you would like to proceed with this request without speaking with your adviser please sign, date and return this form to us.

If signed under Power of Attorney, the attorney verifies that no notice of revocation of power has been received.

Member name

Member signature

Date (DD MM YYYY)

Please return this form to:

iQ Retirement by Russell Investments
Locked Bag A4094
Sydney South NSW 1235

You can also contact us as follows:

Toll free on **1800 555 667**
Operating hours are from Monday to Friday, 9am – 5pm (AEST)

iq@russellinvestments.com.au

russellinvestments.com.au/retirement