



Retirement Benefits Fund Board

GPO Box 446, Hobart Tas 7001

Telephone: 1800 622 631 or 03 6233 3672

Facsimile: 03 6233 3357

RBF ALLOCATED PENSION – APPLICATION FORM

Use this form to start an RBF Allocated Pension or a Transition to Retirement Income Stream.

If this form is not completed in full, a further written election may be required. We cannot commence your pension based on verbal instructions. This may delay your payment request.

RBF staff are available by phoning 1800 622 631 to answer questions or provide assistance to complete this form.

Member's Details

Full Name:

Postal Address:

Suburb State Postcode

Residential Address: As above

Suburb State Postcode

Phone Number:
(Home) (Business) (Mobile)

Member Number: Date of Birth:/...../.....

If you are an overseas resident

Country of residence:

Country of citizenship:

If you are self employed

Includes any person who has made tax deductible contributions to their RBF account.

Occupation:

Business Name (if any):

Business Address:

Suburb State Postcode

ABN (if any)

Pension Payment Instructions

Please pay my pension into the following Bank, Credit Union or Building Society account:

Name of Institution:

Branch Address:

Account Name:

Credit Union Member Number:

BSB Number: Account Number:

Pension Payment Instructions

Pension Amount - Choose one option only

- I nominate to take the MINIMUM pension available
- or**
- I want to receive an annual RBF Allocated Pension of: \$.....
- or**
- Transition to Retirement* pension applicants only:
I want to receive the MAXIMUM Transition to Retirement pension of 10% of my account balance.

Pension Purchase Price

Total purchase price of my RBF Allocated Pension is: \$.....

Sourced from:

- RBF Investment Account \$ or %
- RBF-TAS SG Account \$ or %
- Another membership number: \$ or %

(Note that if you are not using all of your account balance(s) then funds will be withdrawn proportionately from your current MIC options in that account unless you provide other instructions.)

- Contributory Scheme lump sum benefit \$ or %
(Only applies if you are in the process of retiring as a Contributory Scheme member and are planning to use part or all of your benefit to purchase an RBF Allocated Pension.)

- I am rolling money in from another superannuation fund for my RBF Allocated Pension

Fund name:

Investment Directions

If no election is made your funds will be invested in the default Member Investment Choice option, RBF Actively Managed.

Member Investment Choice option	Portion of MIC option to be used	
	Percent	Amount
	%	\$
	%	\$
	%	\$

Draw Down Order

Please indicate the order in which your pension payments should be drawn from your Member Investment Choice options.

Member Investment Choice option
1.
2.
3.
4.

Complete the next page and sign the declaration on the final page to complete your application.

Establishment Date	Method of Payment
<p>This is the date the pension will commence, not the first payment date. The first payment will be made according to your chosen method of payment.</p> <p><input type="checkbox"/> As soon as possible (as processing time allows)</p> <p><input type="checkbox"/> Commence pension on/...../..... with the first payment due on the next scheduled payment date.</p> <p>Allow at least 3 weeks from date of application.</p>	<p>Where an election is not made, pension payments will be paid on a fortnightly basis.</p> <p><input type="checkbox"/> Fortnightly</p> <p><input type="checkbox"/> Monthly 12th monthly</p> <p><input type="checkbox"/> Quarterly 12th day Feb, May, Aug, Nov</p> <p><input type="checkbox"/> Half Yearly 12th day May and Nov</p> <p><input type="checkbox"/> Yearly 12th May</p>

Please note:

- Every effort will be made to establish your RBF Allocated Pension account in accordance with your instructions. In the event funds are not available on the elected date, your pension will commence as soon as is administratively possible.
- Payment will commence in accordance with the payment cycle you have elected.
- First pension payments are calculated on a pro rata basis depending upon the commencement and first payment dates.
- Where an entire account balance is rolled over or transferred, investment returns are not applied during the processing period. In peak processing times this may be between 6 to 13 days.

Verifying your identity

Under Commonwealth legislation, RBF is now required to verify your identity before making a payment. If you have already provided a certified copy of documents to verify your full name, date of birth and current residential address you do not need to do so again.

Any one of the following is acceptable to verify your identity:

- Current driver’s licence or other government issued card that includes your full name, date of birth, current residential address and photograph.
- Current passport that includes your full name, date of birth and photograph.
- Original birth certificate or birth extract showing your full name at your date of birth. If you have changed your name, you will need to provide certified copies of documents relating to your name change (eg marriage certificate). You will also need to provide evidence of your current residential address (eg a notice issued by a utilities provider or local government within the last 3 months).

Provide certified copies or show the original to an RBF staff member

Your documents can be certified by Australia Post, a Justice of the Peace or by most accountants, financial planners, lawyers and police officers. RBF must receive the original certified copy. Copies or facsimiles of the certified document are not acceptable. The person certifying the document will need to write on the copy that they have seen your original document. They must also sign and date the copy, write their name and the basis on which they are authorised to certify such documents.

If the certification is not completed correctly, RBF cannot verify your identity in accordance with the legislative requirements.

More information is available about correct certification and acceptable documents to verify your identity on the Forms & Publications area of RBF’s website www.rbf.com.au.

You will need to sign the declaration on the next page to complete your application.

Declaration

I declare that: *(Please tick one box only)*

- I am aged 55-59 years, retired and do not intend to be gainfully employed for more than 10 hours a week.
- I am aged between 55-59 years and am purchasing a RBF Allocated Pension with unrestricted-non-preserved funds
- I am commencing Transition to Retirement and I am aged 55-64 years
- I am aged 60 or over and have ceased gainful employment or do not intend to be gainfully employed for more than 10 hours a week.
- I am aged 65 or over
- I am totally and permanently incapacitated (suitable evidence will be required)
- I am the surviving partner of an RBF member. (Conditions apply)

I understand that RBF cannot commence my RBF Allocated Pension until I provide my Tax File Number and certified copies of documents to verify my identity.

- Tax File Number Declaration Form attached (required for all members under age 60)
- I have previously provided certified copies of documents to verify my full name, date of birth and/or current residential address.
- I have attached a **certified copy** of evidence to verify my full name, and either date of birth and/or current residential address.

Signature: **Date:**