

Account Based Pension application.



**Defence
Bank**

Please complete this form if you are a Defence Bank RSA holder and wish to open an Account Based Pension. Tick the box where applicable.

The Defence Bank Retirement Savings Account (RSA) is issued by Defence Bank Limited (Defence Bank) ABN 57 087 651 385 AFSL/Australian Credit Licence 234582 and administered by Mainstream Superannuation Services Pty Ltd (ABN 83 082 989 142).

Download, save and send this form to investments@defencebank.com.au

Applicant to complete this section.

Your details.

Title/rank. M. F.

Last name.

Given name(s).

Date of birth.

RSA holder number.

Address and phone details.

Residential address (mandatory).

State. Postcode.

Email (mandatory).

Home/work phone.

Mobile phone.

I was the nominated spouse of a Defence Bank RSA holder at the time of death and this is a reversionary application.

Details of Account Based Income Stream.

Is this a Transition To Retirement (TTR) income stream? Yes. No. Date of commencement of pension payments.

If under the age of 60, I have provided a Tax File Number Declaration. Yes. No.

Note: if the RSA holder intends to make further contributions to the RSA or rollover other eligible payments prior to the commencement of the Account Based income stream, these amounts cannot be considered in any current illustration of an Account Based Pension payment.

Is the Account Based income stream to provide for a reversion to a surviving spouse? Yes. No. If yes, please provide the name and date of birth of spouse:

Name of spouse. Date of birth of spouse.

Investment allocation options. Please indicate how you would like your deposit to be allocated.

The amount you wish to invest is:

Variable rate. \$

The amount you wish to invest is:

Term deposit (minimum \$10,000). \$

Select the term: 6 months. 12 months. 24 months.

Note: your deposit may be subject to tax, government charges and fees which are payable prior to the investment in your RSA term deposit option.

Instructions by the RSA holder.

Minimum. Other. \$

Payment frequency.

Yearly. Quarterly. Half yearly. Monthly.

Pension payments to be credited to.

Name of bank. Account name.

Branch. BSB number. Account number.

Note: once payment of an allocated pension from a RSA commences, no further rollovers can be made to that RSA. Another RSA may be opened for this purpose.

Authorisation to proceed.

Declaration: prior to completion and signing, this application must not be handed to any person unless attached to the PDS.

- If I have received this PDS from the internet or other electronic means, I received it personally and a print out of it is attached to this application form and;
- If applying for an Account Based Pension.

- I declare that I have received and read the 'Defence Bank - Retirement Savings Account' PDS dated 31/08/2023, and that the details given in this application are true and correct.
- I have reached the statutory preservation age and have retired, or be substantially retired from the workplace. A \$50,000.00 minimum balance may be required to commence an Account Based Pension.

Signature.

Date.