

Application Form – Account Based Pension



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

Your Details

Please ensure that all fields are complete.

Title/Rank		Male <input type="checkbox"/>	Female <input type="checkbox"/>
Last name			
Given name(s)			
Date of birth			
Address*			
Town/Suburb	State	Postcode	
Telephone (home)		Telephone (other)	
Email Address			
RSA Number			

Details of Account Based Income Stream

Is this a transition to retirement (TTR) income stream? Yes No

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

Date of Commencement of Pension Payments:

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 the Spouse:

Name	Date of Birth
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Investment Allocation Options

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

Variable Rate

The amount you wish to invest is \$

Term Deposit

The amount you wish to invest is \$ (minimum \$10,000)

Select the term: 6 months 12 months 24 months

Note: Your deposit may be subject to deduction of 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	
Branch	
BSB Number	Account Number
Account Name	

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 this 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 03/09/2018, that this application form was detached from that PDS 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.

Applicant's Signature

Date

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