

# Change of member account details & TFN notification form



Mason Stevens Limited ABN 91 141 447 207 AFSL 351578

Mason Stevens Super ABN 34 422 545 198 RSE Registration Number R1004168

Trustee: Diversa Trustees Limited ABN 49 006 421 638 RSE License Number L0000635 AFSL License 235153

## How to use this form

Use this form if you would like to:

- » Change your name
- » Update your contact details
- » Update your bank account details
- » Correct your date of birth
- » Notify your Tax File Number (TFN)
- » Update ongoing Adviser Fee

## Important notes

### PROOF OF IDENTITY

If you intend to change your name or your date of birth you will need to supply a certified copy of at least one of the following appropriate evidence forms:

- » A certified photocopy of your:
  - » Birth certificate, or
  - » Citizenship/Naturalisation certificate, or
  - » Marriage certificate, or
  - » Divorce certificate, or
  - » Change of Name certificate
- » A certified photocopy of a card issued to you under a law of a State or Territory for the purpose of proving your age which contains your photograph, or
- » A certified photocopy of your national identity card issued by a foreign government, the United Nations or an agency of the United Nations.

### CERTIFIED COPIES OF DOCUMENTS

All copied pages of **ORIGINAL** proof of identity documents need to be certified as true and correct copies by any of the following:

- » A permanent employee of Australia Post with five or more years of continuous service.
- » A finance company officer with five or more years of continuous service (with one or more finance companies).
- » An officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having five or more years continuous service with one or more licensees.
- » A notary public officer.
- » A police officer.
- » A registrar or deputy registrar of a court.
- » A Justice of the Peace.
- » A person enrolled on the Roll of a State or Territory Supreme Court or the High Court of Australia, as a legal practitioner;
- » An Australian consular officer or an Australian diplomatic officer.

- » A judge of a court.
- » A magistrate, or
- » A Chief Executive Officer of a Commonwealth court.

## Important

You should not send any original documents. These should be retained for your records.

Please send certified copies only. Copies of originals that are not certified by one of the above entities will not be accepted.

## Privacy

When we collect your personal information, it is securely stored and will only be used and disclosed to authorised personnel, service providers and third parties for the purposes of:

- » administering your superannuation account
- » making benefit payments
- » direct marketing.

For a copy of the Privacy Policy, contact us on 1300 491 766 or visit [www.masonstevens.com.au/super](http://www.masonstevens.com.au/super).

Our Privacy Policy sets out how you can access information about your details (and update as required).

## Declaration & signature

You (the Member) must complete, sign and date the form and return it to the Fund Administrator.

## Contact details

Mason Stevens Super  
Phone: 1300 491 766  
E: [admin@mssuper.com.au](mailto:admin@mssuper.com.au)  
W: [www.masonstevens.com.au/super](http://www.masonstevens.com.au/super)  
PO Box R1237 Royal Exchange NSW 1225

## Checklist

- Certified copies of documentation attached (if applicable)
- Form has been signed and dated



# Change of member details & TFN notification form

## Current membership details

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Member Number  Date of birth

Title  Mr  Mrs  Miss  Ms  Other

Given name(s)  Surname

**ONLY COMPLETE THE SECTIONS YOU WISH TO CHANGE**

## New membership details

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### Change to your name

If changing your name you must attached a certified copy of one of the following documents;

*(Please tick)*

Birth certificate  Marriage certificate  Naturalisation certificate  
 Change of name certificate  Divorce certificate  Other

Title  Mr  Mrs  Miss  Ms  Other

Given name(s)  Surname

Original signature

New signature

### Change to your contact details

#### Residential address

Suburb  State  Postcode

Country

#### Postal address *(if different to residential address)*

Suburb  State  Postcode

Country

#### Telephone

Home  Mobile

#### New email address

Email



## Update your bank account details

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**IMPORTANT** – To enable us to proceed with payments into this account please provide a copy of your bank statement showing the bank account you have nominated is held in your name or joint names.

Financial institution

Account name

BSB number

Account number

## Correction to date of birth

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Please provide certified documentation to verify the change to your birth date.

Date of birth

## Notification of tax file number (TFN) details

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I have read the Mason Stevens Super or relevant PDS and Additional Information Guide available at [masonstevens.com.au/super](http://masonstevens.com.au/super) or relevant website and I understand that I am not required by law to provide my Tax File Number (TFN).

Please note that the Trustee requires your TFN to match your TFN with the ATO client register to validate your member details. The Administrator **will not be able to accept your application without a valid TFN.**

*Under the Superannuation Industry (Supervision) Act 1993, your superannuation fund is authorised to collect, use and disclose your tax file number.*

*The trustee of your superannuation fund may disclose your tax file number to another superannuation provider, when your benefits are being transferred, unless you request the trustee of your superannuation fund in writing that your tax file number not be disclosed to any other superannuation provider.*

*Declining to quote your tax file number to the trustee of your superannuation fund is not an offence. However, giving your tax file number to your superannuation fund will have the following advantages:*

- » *your superannuation fund will be able to accept all permitted types of contributions to your account/s;*
- » *other than the tax that may ordinarily apply, you will not pay more tax than you need to - this affects both contributions to your superannuation and benefit payments when you start drawing down your superannuation benefits; and*
- » *it will make it much easier to find different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.*

My TFN is:

### Mason Stevens Super can help you find and combine your lost Super

*I give my permission to Mason Stevens Super to use my personal information provided (including TFN) to search for any superannuation money held by the ATO or other Super funds, to the extent the law allows. Mason Stevens Super will contact me and confirm the result of the search, as well as providing transfer documents.*

## Update ongoing adviser fee

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Portfolio name

Self Directed Portfolio (SDP)

Adviser annual charge amount (excluding GST)

Managed Portfolio

The ongoing adviser fee agreed will be deducted from your SDP monthly.



## Member declaration

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I declare that:

- » The information I have provided and any associated documentation in support of the changes advised in this form are, to the best of my knowledge, true and accurate.
- » I understand that my record kept by Mason Stevens Super will reflect the information in this form.
- » I will immediately notify Mason Stevens Super if any of my personal details change in the future.
- » I understand and accept the information contained in this form may be shared with representatives, advisers and service providers of Mason Stevens Super.
- » The information provided in this form could potentially alter my entitlement eligibility and insurance arrangements.
- » I understand that where I have provided my email address that I will receive an automatic login to view my account online at any time. I will also now receive an electronic notification for my annual statement which will be accessible through my online account and I understand that this will continue until I notify Mason Stevens Super that I wish to change this option.

Member's Signature

Date

Please return the completed and signed form to Mason Stevens by:  
Email: [wealth@masonstevens.com.au](mailto:wealth@masonstevens.com.au) | Fax: 02 8270 0298  
Post: Mason Stevens PO Box R1237 ROYAL EXCHANGE NSW 1225

