

Notification/Change of Details



Use this form to notify or change your details with HOSTPLUS Executive.

Please complete the sections required in BLOCK letters, sign the declaration overleaf and enclose any necessary certified documentation.

If you have any questions, please call us on 1300 799 998 anytime between 8am and 8pm, Monday to Friday.

Once completed, please send your form to: HOSTPLUS Executive, Locked Bag 969, Carlton South VIC 3053.

Step 1 Provide your old details

Fill in all your previous details:

Membership number	Date of birth	OFFICE USE ONLY
<input type="text"/>	<input type="text" value="DD / MM / YY"/>	<input type="text"/>
Family name	Given name/s	
<input type="text"/>	<input type="text"/>	
Old address		
<input type="text"/>		
Suburb	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
After hours telephone number	Business hours number	Mobile number
<input type="text"/>	<input type="text"/>	<input type="text"/>

Step 2 Provide your new details

Change my address to:

New address

State **Postcode**

If you now have an e-mail address, or have changed your e-mail address since HOSTPLUS last contacted you, please write it here:

Would you prefer us to contact you via e-mail in the future where practical? Yes No

Change my telephone number to:

After hours telephone number	Business hours number	Mobile number
<input type="text"/>	<input type="text"/>	<input type="text"/>

Change my name to:

Family name	Given name/s
<input type="text"/>	<input type="text"/>

Important: For your change of name to be registered on our records you must:

- attach a certified copy of your Marriage Certificate, or
- attach a certified copy of your Certificate of Change of Name.

Change my preferred beneficiary/ies to:

I hereby wish to change my preferred beneficiary/ies to:

Family name	Given name/s	Nature of dependency (ie. spouse, child, etc)	% Share
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Total must add up to 100%

Step 3 Consider providing your Tax File Number

The Federal Government laws relating to superannuation tax and Tax File Numbers (TFNs) could result in you paying extra tax unnecessarily.

HOSTPLUS is authorised under the *Superannuation Industry Supervision Act 1993* to ask for your TFN and we recommend that you provide it.

You are not obliged to provide your TFN and declining to do so is not an offence. However, if you don't provide your TFN:

- Taxable contributions received for you by HOSTPLUS may be subject to the 10% superannuation surcharge tax (which may not have been payable if you had provided your TFN to us). This is in addition to the 15% contributions tax that currently applies.
- Benefits paid to you may be subject to tax at the *highest marginal rate plus the Medicare Levy* (this may be recovered after lodgment of your tax return).
- In the future, HOSTPLUS may not be able to locate and amalgamate multiple benefits that we may hold for you.

The consequences of not providing your TFN may change in the future as a result of changes to legislation.

continued overleaf

PLEASE DON'T FORGET TO SIGN THE FORM OVERLEAF

Step 3 Consider providing your Tax File Number (continued)

If you elect to provide your Tax File Number (TFN), HOSTPLUS is required by law to properly safeguard it and only use it for approved lawful purposes.

These purposes include:

- to assist in searching for and amalgamating your superannuation benefits in HOSTPLUS where other information is insufficient,
- to advise the Australian Taxation Office (ATO) when a benefit is paid to you or if you have unclaimed superannuation money when you reach the Government's pension age,
- to calculate tax on any eligible termination payment to ensure that benefits paid to you are taxed at reduced rates, and
- to provide information to the Commissioner of Taxation to enable the ATO to assess any surcharge payable on superannuation contributions made by or for you, and to ensure that you are not liable to pay the superannuation tax surcharge if it does not apply to you.

These purposes may change in the future.

If you provide your TFN, HOSTPLUS may also forward it to another regulated superannuation fund or retirement savings account if your benefit is transferred or rolled over in the future (unless you request in writing for this not to be done). Otherwise, your TFN will be treated as confidential.

I wish to provide my TFN to HOSTPLUS and indicate my agreement to the use of my TFN as outlined by signing below.

My Tax File Number is:

Step 4 Attach certified documentation (if applicable)

Changing your name, date of birth or TFN?

If you are changing your name, date of birth or tax file number, please attach a certified copy of one of the following as applicable:

- marriage certificate,
- deed poll,
- certificate to change name,
- divorce certificate, or
- ATO advice.

In addition to supplying one of the above, please also attach certified copies of any two of the following:

- current bill (eg. power bill) showing your present address,
- birth certificate,
- bank statement,
- marriage certificate (if not used already),
- driver's licence, or
- passport.

Please note: If you're changing your name, all documents need to state the name you're now using.

How to certify documents

Step 1 – Make a copy of the original document/s. All copies must be clear and legible before certifying.

Step 2 – Take the original identification document and a photocopy of both sides of the original document to an authorised person. We are unable to accept certification on the reverse side of the photocopied document.

The authorised person must:

- Write in English on the photocopies: 'This is a true and correct copy of the original.'
- Write their name, address, occupation, business hours telephone number and registration number (if applicable) and sign each photocopy.

Who can certify documents

- chiropractor
- dentist
- nurse
- registered medical practitioner
- pharmacist
- psychologist
- veterinary surgeon
- legal practitioner, who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia
- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)

- bank officer with 2 or more continuous years of service
- chief executive officer of a Commonwealth court
- finance company officer with 2 or more years of continuous service
- judge of a court
- Justice of the Peace
- magistrate
- member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants
- minister of religion
- notary public
- officer with, or authorised representative of, a holder of an Australian financial services licence, having 2 or more years of continuous service with one or more licensees
- permanent employee of the Australian Postal Corporation with 2 or more years of continuous service who is employed in an office supplying postal services to the public
- police officer
- Registrar, or Deputy Registrar, of a court
- teacher employed on a full-time basis at a school or tertiary education institution.

Step 5 Sign the declaration

I hereby certify that the information supplied on this form is true and correct.

I consent to HOSTPLUS collecting, using, storing and disclosing the information supplied by me for the purposes of administering my membership in accordance with the HOSTPLUS Privacy Policy.

Your personal information will not be used or disclosed for any other purpose without your consent, except where required by law. You are able to gain access to this information. For more information on privacy or to obtain a copy of our privacy policy, visit our website or call us on **1300 799 998**.

Signature

Date

DD / MM / YY

HOSTPLUS must receive an original signature (ie. photocopies and faxes of this form are not acceptable)

IMPORTANT: PLEASE DON'T SEND ORIGINAL DOCUMENTS TO HOSTPLUS

Please forward this completed form to HOSTPLUS Executive, Locked Bag 969, Carlton South VIC 3053.
phone **1300 799 998** • website www.hostplusexecutive.com.au • e-mail info@mail.hostplusexecutive.com.au

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