Application form

Information sheet

When to use this form

Use this form to apply for:

– AMP Super - Allocated Pension
– AMP Super - Lifetime Pension
– AMP Super - Transition to Retirement
– A combination of these.

Do not use this form if you're a beneficiary member applicant (recipient of a death benefit) - please complete the separate Application form - Beneficiary Allocated Pension to apply for a new AMP Super - Allocated Pension.

> Before you complete this form, please read the latest **Product Disclosure Statement (PDS)** and relevant **Target Market Determination (TMD)**:
>
> - **Allocated Pension Target Market Determination** (including TTR)
>
> - **Lifetime Pension Target Market Determination**
>
> Additional important information and updates to the PDS can be found at **www.amp.com.au/superannuation/retirement**

Combining an Allocated Pension and Lifetime Pension

Combining our Lifetime Pension together with an Allocated Pension gives you the best of both worlds – the confidence of an income for life, and the flexibility to withdraw money when you need it.

Our Lifetime Pension does not allow partial withdrawals, it is an income stream that does not draw down from a balance so does not run out. Diversifying your income sources between a Lifetime Pension and an Allocated Pension can supplement your monthly regular income with more flexible withdrawals as needed.

Learn more about combining your options at amp.com.au/super-lifetime or consider getting financial advice about which solution best suits your needs.

Completing this form

When completing this form please use a blue or black pen. If you make a mistake, simply cross it out and initial the change (don't use liquid paper). Alternatively, you can complete this fillable form by typing into the sections then printing the form and signing it with a pen.

Consolidating your super

You can only open a pension account with a single rollover amount. You can't add money to an existing pension account.

If you have multiple super accounts you'd like to consolidate or want to make extra contributions before starting a pension account, you can do this through your AMP super account. Go to **amp.com.au/consolidation** for more information.

Alternatively, you can request to transfer multiple super accounts into one account using the ATO's online service in your My Gov account.

If you don't have an active AMP Super account, you can open a AMP Super account at **amp.com.au/signaturesuper** where you can consolidate all your super accounts before starting your AMP Super – Allocated Pension.

We can also help you to search for any lost super accounts you may have. Go to **amp.com.au/superannuation/find-lost-super** and follow the steps or you can use the ATO's super search in your My Gov account to do this.

AMP Super Lifetime Boost

Withdrawals and your Lifetime Boost

If you have the Lifetime Boost in your super account with us, taking money out of that super account for any reason means that amount is no longer being calculated for the reduced value to be used in your asset test if you use a Lifetime Pension in retirement.

This includes:

- A rollover into a Transition to retirement account,
- A rollover to another account or fund,
- A lump sum payment made to you.

Meeting a Condition of Release and your Lifetime Boost

When you meet a **'full' condition of release**, you will have 14 days to submit your application to us if you want to convert some or all of your balance to a Lifetime Pension and utilise the Centrelink advantages the Lifetime Boost can provide. After 14 days, the Lifetime Boost has to be turned off by law.

'Full' conditions of release are met when:

- You are over 60 and tell us you have retired or ceased employment
- You turn age 65; or
- You've been permanently incapacitated or are terminally ill at any age.

The Lifetime Boost will also be turned off if your account is closed.

Beneficiaries

Your beneficiary or beneficiaries is who you want to receive your pension benefit in case of your death. You can nominate either one or more non-lapsing beneficiaries, or a reversionary beneficiary. You can't have both non-lapsing beneficiaries and a reversionary beneficiary on the same account but you can have different beneficiaries if you are opening both and Allocated and Lifetime pension account.

If you are adding a non-lapsing beneficiary to your account as part of this application, your signature must be witnessed. See section 14.

More information on beneficiaries can be found in the PDS in the 'What is a beneficiary' section.

Beneficiaries in AMP Super - Lifetime Pension

Including a reversionary beneficiary on an AMP Super - Lifetime Pension must be done as part of this application form and cannot be added later. The minimum age of a reversionary beneficiary on an AMP Super - Lifetime Pension is 50.

A different rate is applied to your starting income depending on how you make this choice.

If you choose to add a Reversionary Beneficiary, your starting income will be calculated using the **couples rate**.

If you don't add a beneficiary or you make a non-lapsing nomination, your starting income will be calculated using the **singles rate**.

The couples rate is slightly lower than the singles rate because your pension payments will continue to your spouse for the remainder of their life after you die.

You can see different starting incomes produced by modifying these variables to help you consider what suits your scenario best in our Lifetime Retirement Income Quote Tool - **super.amp.com.au/public/lifetime-income-calculator**

Collection of Tax File Number (TFN)

We're required to tell you the following details before you provide your TFN for your super products.

Under the *Superannuation Industry (Supervision) Act 1993*, the trustee is authorised to collect, use and disclose your TFN, which will only be used for lawful purposes.

These purposes may change in the future as a result of legislative change. The trustee may disclose your TFN to another super provider when your benefits are being transferred, unless you request in writing that the trustee of your super fund not disclose your TFN to any other super provider.

It's not an offence not to quote your TFN. However, giving your TFN to the fund will have the following advantages (which may not otherwise apply):

- The fund will be able to accept all types of contributions to your account(s).
- The tax on contributions to your super account(s) will not increase.
- Other than the tax that may ordinarily apply, no additional tax will be deducted from your super benefits. This affects both contributions to your super and benefit payments when you start drawing down your super benefits, and
- It will make it easier to trace different super accounts in your name so that you receive all your super benefits when you retire.

If you don't provide your TFN you may also be subject to additional tax including an additional tax on employer contributions.

These purposes may change in the future as a result of further legislative changes. More information about the use of TFNs for super changes can be obtained from the ATO hotline 131 020.

AMP privacy statement

The privacy of your personal information is important to us.

The AMP Privacy Policy provides more information about how we manage and protect your personal information. It sets out how you can access and correct your information, how you may complain about a breach of privacy, and our process for resolving privacy-related enquiries and complaints.

For further information, please go to **amp.com.au/privacy**.

Identification requirements

We're required to comply with the Anti-Money Laundering and Counter-Terrorism Financing Act 2006. This means we may need to obtain additional identification details when you commence a new account or undertake transactions in relation to your account.

Your identification may need to be verified before we can approve your request. We may decide to delay or refuse any request or transaction, including suspending a withdrawal application if we are concerned that there may be a breach of our legal obligations.

Verifying a customer's identity

We need to verify or confirm your identity by checking that certain details you provide in this form **match** the details that are in certain documents you need to attach to this form.

⚠ If you consent to online identification (ID) verification (see **Section 3. Provide proof of your identification** in this form) you'll still need to provide us with details of your ID documents.

However, if you **don't** consent to online ID verification, you'll need to mail us **original certified copies** of your documents (don't send the original documents or email scanned copies to us).

If the document isn't written in English, then you must also attach an English translation prepared by an accredited translator.

Getting your copies certified

A copy of a document must be certified to be a true and correct copy of the original document. Only certain people can certify copies including:

- police officer or sheriff
- justice of the peace or notary public
- legal practitioner, magistrate, judge or registrar/deputy registrar of a court
- pharmacist, physiotherapist or veterinary surgeon
- optometrist, dentist, medical practitioner or nurse
- member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practicing Accountants or the National Institute of Accountants.

You can see the full list of people who can certify documents or extracts at **amp.com.au/identification**.

Example:

> I certify that this is a true and correct copy of the original document.
>
> *John Citizen*
>
> John Citizen, Justice of the Peace
> 10 Other Street
> Suburb NSW 2000
> 02 9999 9999   30 May 2020

Identification documents required

So we can verify your identity, you need to send us the document(s) shown under option **A** or **B**:

Option A – Primary Photographic documents

One of these:

- current Australian state or territory driver licence that has your photo (includes the Mobility Parking Scheme)
- Australian passport that is current or expired within the last two years
- current card issued under a state or territory law to prove your age that has your photo
- current foreign government passport (or similar international travel document) that has your photo and signature
- current foreign driver licence that has your photo
- current national identity card that has your photo.

Option B

Primary Non-photographic documents

Please provide one of the following and one secondary identification document (or two of the following):

- Australian or foreign birth certificate
- Australian or foreign citizenship certificate
- birth certificate extract
- pension card issued by Department of Human Services
- Health Care Card or Commonwealth Seniors Health Card issued by Department of Human Services.
- An Australian Indigenous community identity card
- A marriage certificate or birth extract issued by an Australian State or Territory
- A marriage certificate issued by a foreign government, the United Nations or an agency of the United Nations
- A name change certificate issued by an Australian or foreign government, the United Nations or an agency of the United Nations

Plus

> The documents listed below are only **valid** if they include your full name and residential address.

Secondary identification documents

- a document issued by the Commonwealth or a state or territory within the last 12 months that shows financial benefits paid to you
- a document issued by the ATO within the last 12 months that shows money to be paid to you or that you need to pay to them (make sure you cross out your TFN)
- a document issued by a local government body or utility provider within the last three months that shows the services provided to you at your address
- if you're under 18 years old, a notice issued by a school principal within the last three months that shows how long you attended that school.

> Please keep this information sheet for your records—don't return it with your completed form(s).

Application form

Before you complete this form, please read the latest **product disclosure statement (PDS)** and **target market determination (TMD).**
Additional important information about this product can also be found in the **guides** and (if applicable) PDS updates available at **amp.com.au/superannuation/amp-super**.

Use this form to apply for a new AMP Super – Allocated pension and / or a new AMP Super – Lifetime Pension	**Complete sections**
For all applications	1, 2, 3, 4, 6, 7, 13, 16 plus if applicable – 10, 14, 15, 16
And:	
• If you're applying for an AMP Super - Allocated Pension **only**, including a Transition to Retirement pension	5, 8, 12 plus if applicable - 11
• If you're applying for an AMP Super - Lifetime Pension **only**	5, 9
• If you're applying for **both** an AMP Super Allocated Pension and an AMP Super - Lifetime Pension	5, 8, 9, 12 plus if applicable - 11

Please contact your financial adviser or call us on 131 267 if you have any questions.

Please print in CAPITAL LETTERS and place a cross ✖ in any applicable boxes.

1. Your details

Important: The name, address, and date of birth details MUST match the identification documents provided with this form. All fields are required to be completed in this section.

Title

Date of birth D D M M Y Y Y Y

Surname

Given name(s)

Gender

☐ Male ☐ Female

Occupation (if retired, please write 'retired')

Industry (if retired, please write 'retired')

Residential address (a PO Box isn't acceptable)

Suburb State Postcode

Country of residence (please specify if not Australia)

☐ Australia ☐ Other

Country of citizenship (please specify if not Australia)

☐ Australia ☐ Other

1. Your details continued

Phone number

Mobile number

Email address[1]

1 We'll communicate with you by email. Please email or call us to change your communication preference.

Address for communications

☐ Please cross ✖ if same as residential address.

Address

Suburb State Postcode

Country

Your wealth

How have you built your overall wealth?

☐ Income from employment (eg regular and/or bonus).
☐ Investment income (eg rent, dividends, pension).
☐ Business income.
☐ One-off payment (eg matured investment, court settlement, redundancy, inheritance).
☐ Sales of assets (eg shares, property).
☐ Windfall (eg gift, lottery winnings, gambling).

2. Tax File Number (TFN)

Please provide your TFN:

Note: You don't have to provide your TFN if you're aged 60 or over.

TFN:

If you're under age 60

If you don't provide us with a TFN declaration we're required to withhold tax up to the highest marginal tax rate plus the Medicare levy.

Have you completed an Australian Taxation office (ATO) TFN declaration form (available from **ato.gov.au**)?

- [ ] Yes
- [ ] No

3. Provide proof of your identification

We'll need your identification details to help us make sure we're releasing your benefit to you and to protect your money from fraud.

Choose one of the options below:

Option 1: I choose electronic verification and have Identification details from one of the documents below

- [ ] I authorise AMP Super Fund to disclose my name, address and date of birth to the credit reporting agency to only verify my identity using my driver licence or Australian passport details. They will confirm with AMP Super Fund if my information matches their credit file but won't share other details from it. My information will be matched with relevant official records and the results will be provided through third-party systems.

1. Current Australian driver licence

Full name as shown on your licence

Address as shown on your licence

Licence number

Card number

State of issue

Expiry date

D D M M Y Y Y Y

2. Australian passport that is current or expired in the last 2 years

Full name as shown on your passport

Passport number

Place of birth

Country of birth

Expiry date

D D M M Y Y Y Y

3. Provide proof of your identification continued

Please note that we may need to contact you for additional identification information or documents if electronic verification is not successful.

Option 2: I choose to attach certified paper copies of Identification document

- [ ] I have attached a certified photocopy of my driver licence, passport or other document/s as listed in the Information sheet.
- [ ] Optional but recommended: I also consent to using electronic verification if my paper documentation has been incorrectly certified or can't be read, and I've provided my identification details as listed in the Information sheet.

Each page of your photocopied documents must be certified a true copy of the original document. For instructions on how to get your document correctly certified, refer to the information sheet.

4. Transfer to your new pension/s

Where will the super benefit be coming from to transfer to your new pension/s?

- [ ] **Your AMP Super account**

Account number

If you are starting a new AMP Super Allocated Pension, do you want to link this super account?

- [ ] Yes
- [ ] No

Note: You'll only pay one member fee when you link your super and pension accounts.

- [ ] **Your Super account with a non-AMP fund**

Fund name

Membership/Account number

Australian Business Number (ABN)

For a non Self-Managed Super fund (SMSF) provide the Unique Superannuation Identifier (USI)

For SMSF provide the Electronic Service Address (ESA)

Note: If you have multiple super accounts to consolidate or want to make extra contributions, you need to do this within a super account before transferring a single rollover amount to your new pension/s.

5. Transfer amount to your new pension/s

- [ ] **I want to start a new Allocated Pension or Transition to Retirement account only – complete below:**
  - [ ] Full transfer – transfer my total super account balance to my new AMP Super – Allocated Pension account.
  - [ ] Partial transfer – transfer the following amount to my new AMP Super – Allocated Pension account

$

5. Transfer amount to your new pension/s continued

☐ **I want to start a new Lifetime Pension only – complete below:**

☐ Full transfer – transfer my total super account balance to my new AMP Super – Lifetime Pension account.

☐ Partial transfer – transfer the following amount to my new AMP Super – Lifetime Pension account
$ ________

☐ **I want to start both a new Allocated Pension and Lifetime Pension – complete below:**

☐ Full transfer – transfer my total super account balance to my new AMP Super – Allocated Pension account and my new AMP Super – Lifetime Pension account in the following proportions:

________ % to AMP Super – Allocated Pension account.

________ % to AMP Super – Lifetime Pension account.

☐ Partial transfer – transfer the following amounts to my new AMP Super – Allocated Pension account and my new AMP Super – Lifetime Pension account.

$ ________ to AMP Super – Allocated Pension account.

$ ________ to AMP Super – Lifetime Pension account.

☐ Partial transfer – transfer $ ________ to my new AMP Super – Allocated Pension account and my new AMP Super – Lifetime Pension account in the following proportions:

________ % to AMP Super – Allocated Pension account.

________ % to AMP Super – Lifetime Pension account.

6. Your current situation

Citizen/residency test

We're required by super laws to establish a customer's citizenship/residency status to determine if they're eligible for a pension account.

1. Are you or have you ever been a temporary resident in Australia?
   - ☐ No—go to the **employment status** section
   - ☐ Yes—go to question **2**.
2. If you are or have been a temporary resident, are you now an Australian or New Zealand citizen, permanent resident of Australia, or holder of a retirement visa (subclass 405 or 410)?
   - ☐ No—you're not eligible to apply for a pension account.
   - ☐ Yes—go to the **employment status** section below.

Employment status

Please choose **one** option below:

☐ I've reached preservation age[2]. I'm still employed and I'm starting a pension under the transition to retirement rules.

☐ I've reached preservation age[2]. I'm under age 65 and was previously employed. I'm now retired from the workforce.

D D M M Y Y Y Y Date ceased work/retired.

6. Your current situation continued

☐ I'm aged between 60 to 64 (inclusive) and I've ceased employment since turning age 60.

D D M M Y Y Y Y Date ceased work/retired.

☐ I'm aged 65 or older.

☐ I'm starting a pension with unrestricted non-preserved benefits.

☐ I've ceased employment due to permanent incapacity or invalidity.

D D M M Y Y Y Y Date ceased work/retired.

2 Please refer to the AMP Super **member guide** for preservation age details.

7. Before starting a new pension account

Tax deductions on your super contributions (if applicable)

Complete this section if you've made **personal** super contributions to your AMP Super account and are eligible to claim a tax deduction. **Note**: We can't accept a **notice of intent to claim a tax deduction** once all or part of your contributions have been transferred out of your super account to start a pension account.

Do you want to claim a tax deduction (if eligible) on personal super contributions made into your AMP Super account?

☐ Yes—please attach a completed **ATO notice of intent to claim or vary a tax deduction for personal contributions form** (form number NAT 71121) with this application for each internal transfer required. The NAT 71121 is available at **ato.gov.au.**

☐ No

Recontribution of super (if applicable)

Complete this section if you want to withdraw a full or partial amount from your AMP Super account and recontribute it back to your AMP Super account as a member contribution.

Do you want to do a recontribution of super?

☐ Yes—please attach a completed **recontribution of amounts withdrawn from your AMP Super account** form (form number NS7002_F) available at **amp.com.au/resources/find-a-form.**

☐ No

Consolidating your AMP accounts (if applicable)

Do you want to consolidate your AMP accounts?

☐ No—go to section **consolidating non-AMP accounts**

☐ Yes—please provide details below:

Internal transfer 1

Account number ________

Please transfer: ☐ Full ☐ Partial

Partial amount: $ ________

Internal transfer 2

Account number ________

Please transfer: ☐ Full ☐ Partial

Partial amount $ ________

7. Before starting a new pension account continued

Consolidating your non-AMP accounts (if applicable)

Do you want to consolidate your non-AMP accounts?

☐ No

☐ Yes—go to **amp.com.au/consolidation** for more information.

8. Initial income payment instructions – Allocated Pension and Transition to Retirement only

You can change the details below at any time.

Income payment frequency

Please choose the frequency of your income payment:

☐ Fortnightly ☐ Monthly ☐ Quarterly

☐ Half-yearly ☐ Yearly

Date of first income payment

Please choose an income payment start date:

D D M M Y Y Y Y

Note: If you don't choose an income payment start date, we'll pay your first income payment, one payment frequency after starting your Allocated pension account.

Regular income payment amount (gross of tax)

Please choose your regular income payment amount:

☐ **Minimum** amount allowed under legislative guidelines.

☐ **Maximum** amount allowed under legislative guidelines (only available for transition to retirement accounts).

☐ **Nominated** amount entered below (subject to minimum/maximum guidelines per income payment frequency chosen above).

$

Bank account details

Payments can only be made to a bank, building society or credit union account. The account must be held in your name or jointly held in your name (e.g John Smith or John & Jane Smith).

Payments can't be made to a business, trust or loan account.

Financial institution name

Account name

BSB number Account number

9. Income payment instructions – Lifetime Pension

Income payment frequency

X Monthly

Date of first income payment

12th of the month after starting your AMP Super - Lifetime Pension account

9. Income payment instructions – Lifetime Pension continued

Regular income payment amount (gross of tax)

The starting income you will receive is based on the rate disclosed in the PDS on offer relevant to the date you apply or commence income payments.

Bank account details

Payments can only be made to a bank, building society or credit union account. The account must be held in your name or jointly held in your name (e.g John Smith or John & Jane Smith).

Payments can't be made to a business, trust or loan account.

Financial institution name

Account name

BSB number Account number

10. Death benefit nomination

You can make a non-lapsing beneficiary nomination, or a reversionary beneficiary nomination below. Otherwise, you can do this securely online via **My AMP** without the need of witnesses.

However, if you are starting a new AMP Super Lifetime Pension, any reversionary beneficiary must be nominated now before your account is set up and cannot be added at a later date. If you choose to add a reversionary beneficiary you will receive the couples rate for your starting income. If you don't nominate a beneficiary or you make a non-lapsing nomination, you will receive the singles rates for your starting income. The couples rate is lower than the singles rate because your pension payments will continue to your spouse for the remainder of their life after you die.

If you don't make a death benefit nomination, your benefit will be paid to your estate. If you don't want to make a nomination or if you want to make your nomination online via your **My AMP** account, there's no need to complete this section. **Note:** A reversionary beneficiary cannot be added to an AMP Super - Lifetime Pension in My AMP.

What kind of nomination do you want to make (select **one** option only)?

☐ **Non-lapsing** (nomination won't expire)

Complete the **nominated beneficiaries** section on the next page and have two witnesses sign section **12. Witness declaration.**

☐ **Reversionary beneficiary**

Complete the **reversionary death benefit nomination** section on the next page with your spouse's information and provide their identification details. They will also need to sign to consent to electronic verification of their identification. No witness signatures are required.

If you are starting both a new AMP Super - Allocated Pension and a new AMP Super - Lifetime Pension and you want different beneficiaries on these accounts, also complete and return a separate **Beneficiary nomination** form (form number 80000.3) available at **amp.com.au/resources/find-a-form**.

Nominated beneficiaries

I nominate the following beneficiaries to receive the specified proportion of the benefit payable at my death:

Beneficiary name 1

Date of birth D D M M Y Y Y Y

Proportion of benefit? %

Gender

☐ Male ☐ Female

Relationship to you

☐ Spouse ☐ Child ☐ Financial dependant ☐ Interdependent relationship

Beneficiary name 2

Date of birth D D M M Y Y Y Y

Proportion of benefit? %

Gender

☐ Male ☐ Female

Relationship to you

☐ Spouse ☐ Child ☐ Financial dependant ☐ Interdependent relationship

Beneficiary name 3

Date of birth D D M M Y Y Y Y

Proportion of benefit? %

Gender

☐ Male ☐ Female

Relationship to you

☐ Spouse ☐ Child ☐ Financial dependant ☐ Interdependent relationship

Beneficiary name 4

Date of birth D D M M Y Y Y Y

Proportion of benefit? %

Gender

☐ Male ☐ Female

Relationship to you

☐ Spouse ☐ Child ☐ Financial dependant ☐ Interdependent relationship

Proportion of benefit?

Estate/Legal Personal Representative %

Total 1 0 0 %

10. Death benefit nomination continued

Reversionary death benefit nomination

Complete this section if you want to nominate a reversionary beneficiary:

Spouse full name

Spouse date of birth D D M M Y Y Y Y

Gender

☐ Male ☐ Female

We'll need your spouse's identification details to verify their information.

Reversionary beneficiary to complete - Choose one of the options below:

Option 1: I choose electronic verification and have Identification details from one of the documents below

☐ I authorise AMP Super Fund to disclose my name, address and date of birth to the credit reporting agency to only verify my identity using my driver licence or Australian passport details. They will confirm with AMP Super Fund if my information matches their credit file but won't share other details from it. My information will be matched with relevant official records and the results will be provided through third-party systems.

1. Current Australian driver licence

Full name as shown on your licence

Address as shown on your licence

Licence number

Card number

State of issue

Expiry date D D M M Y Y Y Y

2. Australian passport that is current or expired in the last 2 years

Full name as shown on your passport

Passport number

Place of birth

Country of birth

Expiry birth D D M M Y Y Y Y

10. Death benefit nomination continued

(!) Please note that we may need to contact you for additional identification information or documents if electronic verification is not successful.

Option 2: I choose to attach certified paper copies of Identification document.

☐ I have attached a certified photocopy of my driver licence, passport or other document/s as listed in the Information sheet.

☐ Optional but recommended: I also consent to using electronic verification if my paper documentation has been incorrectly certified or can't be read, and I've provided my identification details as listed in the Information sheet.

(!) Each page of your photocopied documents must be certified a true copy of the original document. For instructions on how to get your document correctly certified, refer to the information sheet.

Reversionary beneficiary signature

✘

11. Advice fees (if applicable) – Allocated Pension and Transition to Retirement only

If you've agreed on an advice fee for personal advice with a financial adviser who has an agreement with AMP, please complete this section with your financial adviser.

Refer to the **advice fees for personal advice** section of the PDS for more information.

☐ **A one-off advice fee amount**

A one-off amount paid from my initial investment.
This fee can only be deducted for agreed advice services provided within 12 months from the fee start date.

Super account $ (Including GST) — Fee start date D D M M Y Y Y Y

Or

Pension account $ (Including GST) — Fee start date D D M M Y Y Y Y

☐ **Fixed term advice fee**

Your consent for the fixed term advice fee will last for the period you nominate below as agreed between you and your adviser up to a maximum of 12 months.

Pension account $ per month (including GST)

Or

. % pa of your account value (including GST) paid monthly

Fee start date D D M M Y Y Y Y — Fee end date D D M M Y Y Y Y

11. Advice fees (if applicable) – Allocated Pension and Transition to Retirement only continued

Notes:

– Advice fees that are deducted from your account will reduce your account balance over time.
– You can't select both a dollar amount and a percentage at the same time for the fixed term advice fee for personal advice.
– These fees won't be paid if your account balance is below $10,000.
– If no amount is entered in this section, no advice fee for personal advice will apply.
– There are limits on the amount of advice fees that may be deducted, refer to the member guide for more information about advice fee caps.

12. Investment options – Allocated Pension and Transition to Retirement only

– There are risks with investment options. Go to **amp.com.au/investment-risks** to find out more about the risks of investing and investment choices. You can also find more information about investment options in the investment guide available at **amp.com.au/signaturesuper.**
– You can select up to 15 investment options for your AMP Super - Allocated Pension account.
– You can nominate your investment profile in the **I want my initial account balance to be** column in the investment option table on the next page. The total must add up to 100%.

Alternatively, if you have a AMP Super account, you can choose to continue to use your investment option profile from your AMP Super account for your new AMP Super - Allocated Pension account.
The investment allocation will be the same investment weighting proportions as held on the day of the super to pension transfer. If you choose this option, your payments will be paid as per the default payment option in the following section.

(!) Some investment options aren't available in AMP Super - Allocated Pension. Refer to the **investment guide** or the investment option table on the next page for available investment options.

Initial account balance investment allocation

Please choose the initial account balance investment allocation for your new allocated pension account:

☐ Cross this box to continue using your investment profile from your AMP Super account for your new AMP Super - Allocated Pension account.

Note: Term deposits held in your super account can't continue in your pension account. A new term deposit will need to be created. If you want to invest in a term deposit, please complete a term deposit form available at **amp.com.au/resources/find-a-form.**

If you've selected this box and you've chosen not to set up a term deposit in your pension account, go to section **auto-rebalancing**.

☐ Tick this box to chose a new investment allocation and complete the **I want my initial account balance to be** column in the investment option table on the next page. The total must add up to 100%.

12. Investment options – Allocated Pension and Transition to Retirement only continued

Pension payment investment selection

Please choose where your income payments are to be drawn from:

☐ Default payment option – deduct pension payments from each investment option in proportion to the value of your investment option at the time.

Or

☐ Nominated payment profile – deduct pension payments from the nominated investment options in the proportions you request in the **I want my income payments from** column in the investment option table on the next page. The total must add up to 100%.

12. Investment options – Allocated Pension and Transition to Retirement only continued

We'll use the default payment option if you don't choose where your income payments are to be drawn from.

Auto - rebalancing

Refer to the **investment guide** for more information about auto-rebalancing.

Would you like your investments to auto-rebalance?

☐ No

☐ Yes, please choose the frequency:

☐ Quarterly ☐ Half yearly ☐ Yearly

Investment option name	Pension Code	Transition to retirement code	I want my initial account balance to be: Percentage (%)	I want my income payments from: Percentage (%)
Multi-sector investment options				
Actively managed				
Future Directions Balanced	NAFB	SAFB		
Future Directions Conservative	NAFC	SAFC		
Future Directions Growth	NAFG	SAFG		
Future Directions High Growth	NAFA	SAFA		
Future Directions Moderately Conservative	NAFM	SAFM		
Passively managed				
Balanced Index	NBEI	SBEI		
Conservative Index	NCEI	SCEI		
Growth Index	NBEG	SBEG		
High Growth Index	NEHG	SEHG		
Moderately Conservative Index	NMCO	SMCO		
Environmental, social and governance focused				
Pendal Sustainable Balanced	NESG	SESG		
Single-sector investment options				
Actively managed				
Specialist Australian Share	NAFU	SAFU		
Specialist Australian Small Companies	NFSC	SFSC		
Specialist Diversified Fixed Income	NCDI	SCDI		
Specialist Geared Australian Share	NAFS	SAFS		
Specialist International Share	NAFI	SAFI		
Specialist International Share (Hedged)	NAFH	SAFH		
Passively managed				
Australian Fixed Interest Index	NOPL	SGMH		
Australian Property Index	NPEI	SPEI		
Australian Share Index	NASE	SASE		
Global Fixed Interest Index (Hedged)	NIFI	SIFI		
Global Listed Infrastructure Index (Hedged)	NGLH	SGLH		
Global Property Index (Hedged)	NLPH	SLPH		
International Share Index	NISE	SISE		
International Share Index (Hedged)	NISH	SISH		
Cash				
Super Cash	NBSC	SBSC		
		Total	**0.00** %	**0.00** %

13. Acknowledgment and declaration

I agree and declare that:

- I've received and have been given the opportunity to read all sections of the PDS and TMD.
- I'm applying to become a member of an AMP Super - Allocated Pension, AMP Super - Lifetime Pension and/or an AMP Super - Transition to Retirement account, which are part of the AMP Super Fund and are bound by the terms of the Trust Deed of the Fund.
- I acknowledge that it may be a criminal offence to knowingly provide false or misleading information or documents in connection with this application. I'm not commonly known by any names different to those disclosed in this application form, unless I have disclosed otherwise to N.M. Superannuation Pty Ltd (N.M. Super).
- Any document or information to be used for the purposes of this application (whether or not provided on or with this application) may be used for any other products, services or benefits offered or provided to me/us by or through N.M. Super or any other company in the AMP group.

AMP Super – Lifetime Pension

- I've had the opportunity to seek financial advice regarding AMP Super - Lifetime Pension (including through AMP's digital advice journey) and this application has taken any advice into consideration.
- I understand that by investing in a Lifetime Pension, I am reducing my flexibility to access my initial investment amount if I choose to exit. I acknowledge that any applicable exit benefit may result in a final amount that is less than my original investment.
- I understand that AMP Super - Lifetime Pension is not designed for members who require flexible or ongoing access to their capital and who do not have access to other readily available funds (such as an allocated pension, cash or other liquid investments).
- I understand that AMP Super - Lifetime Pension is not designed for members who have a significantly reduced life expectancy, unless the product is being used as part of broader retirement or estate planning considerations.

Investment choices - AMP Super Allocated Pension only

- I request N.M. Super to complete my investment instructions in accordance with my selections in this form.
- I understand the risks and effects of my investment choice.

Advice fees - Allocated Pension and Transition to Retirement only

- I've agreed to the advice fees with my financial adviser for personal advice outlined in section **10. Advice fees (if applicable)** of this form and request AMP to process these fees.
- I understand that I can cancel my advice fees at any time by contacting my financial adviser or AMP. If I want to change the one-off advice fee, I will contact AMP before the fee start date.
- I confirm that the advice fees I've agreed on, only relate to the services my financial adviser provides for the account I've nominated in section **10. Advice fees (if applicable)** of this form and not to other advice/services my adviser is also providing.

13. Acknowledgement and declaration continued

- This agreement entitles me to receive one or more of the following super advice services as agreed with my adviser:
  - contribution strategies
  - super/pension investment portfolio review
  - accessing my super/pension benefits.
- I've given my consent for the advice fees to be deducted from my account.

Transfer of super benefits

- I authorise the transfer of my benefits from my previous super fund(s) (if requested) to either my AMP Super account, my AMP Super - Allocated Pension account or my AMP Super - Lifetime Pension account (if applicable).
- I authorise the transfer of my benefits from my AMP Super account to either or both an AMP Super - Allocated Pension and a AMP Super - Lifetime Pension (if applicable).
- I'm aware that I can ask the trustee for all the information that I need to understand my benefit entitlements in my super accounts (including information on the fees, insurance cover, investment options and the effect of a transfer on those benefit entitlements) and I don't need any further information.
- If I have insurance cover within a super account, I understand that the full transfer of my benefit may cause cancellation of that insurance cover. I have all relevant information that I need to understand the implications that the transfer will have on my insurance cover.
- I'm aware of the deduction of fees that may result from the transfer from my super account (if any) and any tax payable from the benefits transferred (subject to legislative restrictions).
- I understand that in certain circumstances N.M. Super may deduct tax from the untaxed portion (if any) of the super lump sum or directed termination payments rolled over to my AMP Super account.
- If I have a term deposit in my AMP Super account to be transferred to my AMP Super - Allocated Pension, I understand that my term deposit will be broken if I've requested a:
  - full transfer, or
  - partial transfer amount that's over the balance of my investment options excluding any term deposit.

Death benefit nomination

- I request the trustee to accept my death benefit nomination for my AMP Super – Allocated Pension and/or AMP Super – Lifetime Pension.
- Where I'm making a non-lapsing death benefit nomination as part of this application, the two witnesses who signed this form below were present at the time of signing.

13. Acknowledgement and declaration continued

Member Signature

If signed under a Power of Attorney

You need to submit a notice of non-revocation letter and provide a certified copy of the Power of Attorney to us.

Applicant name/ Power of Attorney name

Applicant signature/ Power of Attorney signature

✘

Date

D	D	M	M	Y	Y	Y	Y

14. Witnesses declaration

Only complete this section if you're making a non-lapsing death benefit nomination as part of this application.
Please make sure both witnesses are present to witness and sign this application **on the same date** as you.

Witness declaration:

– I'm over 18 years of age.
– I'm not a nominated beneficiary of this applicant and I'm not one of the beneficiaries named in section **9. Death benefit nomination** of this form.
– This form was signed and dated by the applicant in my presence.
I've signed and dated this form on the same day as the applicant.

Witness 1

Both witnesses must sign **on the same date** as the applicant.

Given name(s)

Surname

Witness signature **1**

✘

Date

D	D	M	M	Y	Y	Y	Y

14. Witnesses declaration continued

Witness 2

Both witnesses must sign **on the same date** as the applicant.

Given name(s)

Surname

Witness signature **2**

✘

Date

D	D	M	M	Y	Y	Y	Y

15. Checklist

Have you:

- [ ] Read and understood the PDS and TMD?
- [ ] Completed all relevant sections of this form?
- [ ] Completed and attached an ATO **TFN declaration form** if you're under age 60 (refer to section 2. Tax File Number (TFN))?
- [ ] Have you either provided identification document details and your consent for electronic verification in section 3 or provided a certified copy of your identification documents?
- [ ] If applicable, made any additional contributions to your super account and/or submitted an ATO **notice of intent to claim or vary a tax deduction for personal contributions form** (refer to section **7. Before starting your new pension account)?**
- [ ] If applicable, completed and attached a **recontribution of amounts withdrawn from your AMP Super account** form (refer to section **7. Before starting your new pension account)?**
- [ ] If you have nominated a reversionary beneficiary in section 10, has your spouse provided their identification document details and their consent for electronic verification by signing or provided a certified copy of their identification documents?
- [ ] If you have nominated one or more non-lapsing beneficiaries in section 10, have 2 witnesses completed section 14 at the same time as you have signed this form?
- [ ] If applicable, completed and attached a **Beneficiary nomination** form (refer to **section 10 Death benefit nomination**)?
- [ ] Read and understood section **13. Acknowledgement and declaration**?
- [ ] Signed and dated the form where indicated?

Where to send this form

Mail or email this completed form (and any other relevant documentation) to:

AMP Limited
PO Box 6346
WETHERILL PARK NSW 1851

ris_enquiries@amp.com.au

Any questions?
131 267

16. Financial adviser use only

To be completed by your financial adviser (if applicable).

Advice fee cap details

1. Does your client have other super and/or pension accounts?
   - ☐ Yes—go to the next question.
   - ☐ No
2. Are the advice fees in section **10. Advice fees (if applicable)** more than advice fee caps that apply to your client's total account balances across all super and/or pension accounts?
   - ☐ Yes—please refer to the following points for **advice fee cap exceptions:**
     - An advice fee cap exception approval is required to charge above the advice fee caps.
     - You can apply for an exception using the **advice fee cap exception request** (80068.0) available on **Planner Portal >Forms & tools > Product forms > Planner forms >Servicing and Maintenance.**
     - If you've received approval for an advice fee cap exception number (for one or more accounts), please include this below and submit copy of your approval with this form.

     Advice Fee cap exception number:

   - ☐ No

Design and distribution obligations

The following question is for the internal monitoring of our design and distribution obligations. It's intended to assist with the ongoing appropriateness of the TMD and design and distribution obligation compliance.

This information may be provided to Australian Securities and Investments Commission (ASIC) as requested by them.

Is the client **inside** the TMD for AMP Super - Allocated Pension?

☐ Yes

☐ No—please choose the reasons below:

- ☐ Risk of client harm is considered to be low.
- ☐ Client is invested in a diversified portfolio.
- ☐ I've assessed that this product is suitable for the client's objectives, financial situation, and needs.
- ☐ Other—provide details below:

16. Financial adviser use only continued

Notes

I agree and declare that:

- The client has received personal advice in relation to this product, the advice is current, and this distribution is consistent with that advice.
- I've disclosed to my client all information relating to the one-off advice fee and fixed term advice fee and agreed with my client to the advice fee outlined in section **10. Advice fees (if applicable).**
- I understand that any advice fees nominated in this form will replace any arrangements previously agreed.
- Any advice fee is for advice services I've agreed with the member to directly provide for their account nominated in section **4. Your AMP Super account** and/or the new pension account.

Financial adviser ID

Financial adviser name

Name of licensee

AFSL number

Phone number

Email

Financial adviser signature

✗

Date

D D M M Y Y Y Y