

HESTA income stream change of income payment amount and frequency

HESTA

1 Personal details

Member number:

Given name/s:

Family name:

Telephone number:

2 Income stream payment details

If you do not nominate a payment amount, we will pay the minimum amount the government requires you to withdraw.

Please select one option only.

The amount I would like to receive is:

Minimum amount (default)

The minimum amount approved under government legislation (see 'Working out your minimum payment amount' on pages 43-44 of the PDS before choosing this option. NOTE: If an income stream commences after 1 July your first year payment will be pro-rated between commencement and the following 30 June), **or**

Maximum amount (Transition to retirement (TTR) members under 65 only)

10% of my account balance for a full year. If you have selected the maximum, please choose one of the following options:

- the full maximum for the first financial year
- the maximum for the remainder of this financial year on a pro-rata basis (default), **or**

Nominated amount per payment

Nominate an amount that will result in an annual amount that is between your minimum and maximum income limits

\$ **or**

Nominated amount + CPI (TTR members cannot exceed 10%)

Nominate an amount (**per income payment**) within your minimum and maximum income limits that will be increased in line with CPI each year

\$ **or**

Nominated amount + indexation (TTR members cannot exceed 10%)

Nominate an amount (**per income payment**) within your minimum and maximum income limits that will be indexed each year

\$ **or**

Please select the level of indexation each year:

1% 2% 3% 4% 5%

Please note: If you invest between 1 June and 30 June, your minimum amount is zero. You may choose not to receive a payment until the next financial year by placing an 'X' here:

3 Income stream payment frequency

Note: If you do not nominate the frequency of your income payments, your income will be paid annually on 30 June.

I would like to receive my income payments:

- fortnightly monthly quarterly
 half yearly yearly

Please nominate your payment start date:

For monthly, quarterly, half-yearly or yearly payments only, please nominate a payment date:

- 15th of the month, **OR** 28th of the month, **OR**
 Next available payment period (15th or 28th of the month)

The exception to this, is the month of July, where yearly payments will only be made on the 28th day of the month. If you don't nominate a payment date, your income payment will be the next available payment date. Your payment nomination will remain in place until you advise us in writing to change it.

4 Member declaration

- I declare that I am the HESTA Income Stream member whose details appear on this form.
- I confirm that the details I have supplied are correct and request the Trustee to pay my income payments as requested and in accordance with the provisions of the Trust Deed.
- I have read the privacy information entitled 'Protecting your personal information' contained in the current *HESTA Income Stream Product Disclosure Statement* relating to the financial product I have acquired, and acknowledge that the HESTA Privacy Collection Statement is available from the HESTA website at hesta.com.au/privacy
- I have read and understood the HESTA Privacy Collection Statement and consent to the trustee of HESTA collecting, using and disclosing my personal information.
- I understand that if I do not provide you with the information requested in this form, you may not be able to accept or carry out my requests or instructions.

Member signature:

Date:

Return your completed form

Scan and email all requirements to hestais@hesta.com.au
or mail to: HESTA, Locked Bag 5136, Parramatta NSW 2124

! Changing your HESTA Income Stream income payments may have tax implications. It is strongly recommended that you speak to a financial adviser prior to making any decisions in relation to your HESTA Income Stream account.

contact us

hestais@hesta.com.au | 1300 734 479 | **Email form to hestais@hesta.com.au or mail to: HESTA, Locked Bag 5136, Parramatta NSW 2124**

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