



HESTA income stream change of income payment amount and frequency



Use this form to change your income payment amount and/or frequency. Please consult a financial adviser before making a decision. Type in your details or complete in pen using CAPITAL LETTERS. Print 'X' to mark boxes where applicable.

1. Personal details

Member number:

Given name/s:

Family name:

Date of birth:

D

D

M

M

Y

Y

Y

Y

Residential address (PO Box not accepted):

Suburb

State/Terr.

Postcode

Postal address (only complete if different from above):

Suburb

State/Terr.

Postcode

Mobile or daytime phone number:

Email:

2. Income stream payment amount

!

Select one option only.

The amount I would like to receive is:

X

Minimum amount (default)

Minimum amount approved set by the government based on your age. If your HESTA Income Stream account starts after 1 July, the amount you choose will be paid pro-rated across the rest of the financial year **or**

2. Income stream payment amount (continued)

X

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

10% of my account balance for a full year.

X

Nominated amount per payment

Enter the gross amount per payment

\$

How much do you want this amount to increase by each year?

X

None

X

1%

X

2%

X

3%

X

4%

X

5%

X

CPI

3. Income stream payment frequency

I would like to receive my income payments:

!

Select one option only.

X

fortnightly

Your payment will start with the next available fortnight.

X

monthly

X

half yearly

X

quarterly

X

yearly

Nominate a payment start date which can be the 15th or 28th of the month.

Nominate your payment start date:

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.

Page 1 of 2

4. Member declaration

- I confirm the details I have supplied are true and correct and instruct the trustee of HESTA to process my request in accordance with the provisions of the HESTA Trust Deed available at hesta.com.au/disclosures or by calling 1800 813 327.
- I acknowledge that, before I sign this form, I have read and understand the HESTA Income Stream Product Disclosure Statement available at hesta.com.au/pds or by calling 1800 813 327.
- I understand if I do not provide you with all information requested in this form, you may not be able to accept or carry out my request.
- I have read and understood HESTA's Privacy Collection Statement which is available at hesta.com.au/privacy or by calling 1800 813 327. I consent to my personal information being collected and used by the Trustee for the ongoing administration of my membership by the fund administrator and other service providers.
- By providing my email address and/or phone number, I nominate those as my up-to-date contact details, and consent to HESTA providing me with information about HESTA's products and services, as well as marketing communications including third party products and services.

Signature:

Date:

Return your completed and signed form to hestais@hesta.com.au or mail to: **HESTA, Locked Bag 35007, Collins St West VIC 8007.**

If you have any questions about completing this form, call us on 1300 734 479 between 8.00am and 8.00pm (AET) Monday to Friday.

! 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

hesta@hesta.com.au | 1800 813 327 | Locked Bag 35007, Collins St West VIC 8007 | hesta.com.au

Issued by H.E.S.T. Australia Ltd ABN 66 006 818 695 AFSL 235249, the Trustee of HESTA ABN 64 971 749 321. This information is of a general nature. It does not take into account your objectives, financial situation or specific needs so you should look at your own financial position and requirements before making a decision. You may wish to consult an adviser when doing this. The target market determination for HESTA products can be found at hesta.com.au/TMD. Before making a decision about HESTA products you should read the relevant Product Disclosure Statement (call 1800 813 327 or visit hesta.com.au/pds for a copy), and consider any relevant risks (visit hesta.com.au/understandingrisk). Please refer to the Privacy Policy and Privacy Collection Statement at hesta.com.au/privacy for details about how HESTA collects, uses and discloses personal information.