



### Step 3: Payment instructions

Pay directly to my/our bank, credit union or building society account.

- Please ensure the Australian bank, credit union or building society account details provided are accurate and written clearly. We cannot be held liable where incorrect details are provided.
- We can only deposit amounts into an account held in your name or jointly in your name.
- It will take at least two business days after processing for the proceeds to be credited to your account.)

You must provide Proof of identity by completing Step 4 if you are setting up or updating your bank details.

Account holder name/s

Branch (BSB) number

Australian bank account number

Name of bank or financial institution



## Step 5: Read our privacy information

The personal information provided on this form is collected and held by Aware Super, in accordance with the Australian Privacy Principles of the Privacy Act 1988 (Cth), for the purpose of administering accounts and providing services associated with fund membership. For further information about how personal information is handled, please call us on 1300 650 873 or visit [aware.com.au/privacy](http://aware.com.au/privacy) to view the privacy policy (a hard copy of the policy may also be provided on request). The policy contains information about access to and correction of personal information, how a complaint can be made about a privacy breach and other important information about how personal information is collected, used and disclosed.

**IMPORTANT NOTE:**  
Complete and sign the Declaration.

## Step 6: Declaration

I declare that:

- All information provided on this form is true and correct.
- I have read the current Product Disclosure Statement for the relevant product as well as any supplements or on-line updates. The relevant PDS can be found at [aware.com.au/pds](http://aware.com.au/pds).
- I understand that transactions on an investment fund can trigger a capital gains event and may have tax implications.
- I understand that where joint account holders have not advised the Trustee in writing that no instruction in respect of the account will be valid and binding unless it is executed by all the joint account holders, the Trustee may act in reliance on, and all the joint account holders will be bound by, any instruction in respect of the account held jointly which is executed by any one of the joint account holders.
- I understand that if the request is received by the trustee before 3pm AEST/AEDT, the request will usually be processed using that same day's unit price; if received after 3pm AEST/AEDT it will be treated as having been received the following business day (before 3pm AEST/AEDT) and therefore receive the next business day's unit price.
- I understand that any payment will be made to the bank account/fund noted in Step 3. I will not hold Aware Financial Services liable for any loss incurred if those bank account/fund details are incorrect.
- I have read, understood and accept the Aware Super privacy policy.

Signature of Member 1\*

Director 1/Sole Director & Company Secretary/Trustee 1/Chairperson

Date signed\* (DD-MM-YYYY)

Signature of Member 2

Director 2/Company secretary/Trustee 2/Treasurer

Date signed (DD-MM-YYYY)

Individual accounts: To be signed by the account holder.  
Joint accounts: Only one joint holder may sign unless the trustee has been instructed in writing that all account holders must sign.  
Company: To be signed by two directors, or one director and company secretary, or sole director/sole company secretary.  
Association: To be signed by Chairperson and Treasurer (or equivalent).

**Upload or post the form to us.**

## Step 7: How to send us your completed form

Upload clear copies of your completed form and supporting documents via our website at [aware.com.au/upload](http://aware.com.au/upload). Acceptable file formats are pdf, jpeg, jpg and png. OR Please post the completed form to:  
Aware Super  
GPO Box 89  
MELBOURNE VIC 3001

In case you need any further assistance, please contact our Member Support Team on 1300 650 873.

# Notes

## Proof of identity

### Have you changed your name?

If you have changed your name we must obtain and verify your previous full name and new full name against certified copies of linking documents displaying both names, such as:

- From Birth, Death's and Marriages Registration Office:
  - marriage certificate (ceremonial certificate is not accepted)
  - relationship certificate
  - change of name certificate
  - birth certificate displaying previous names
  - statutory declaration linking both names and clearly outlining the intention

If you have reverted to your maiden name, we will require your marriage certificate, showing your maiden name and your married name.

- Deed poll

### Power of attorney

If you are requesting benefits on behalf of the member as the holder of their Power of Attorney, you must provide certified copies of POI documents for yourself and the member.

We may request updated and/or additional certified POI documents at any time if we consider this is necessary for the security of our members' benefits.

### Proof of identity

Any change of name, change of bank account, update to your mobile number or providing an overseas address we have recorded for you must be supported by proof of identity (POI) documentation.

Providing certified proof of your identity is a three-step process

You can provide:

A certified copy of one of the following documents:

- A current drivers licence with a photograph, issued in Australia or under the authority of a foreign country.<sup>^</sup>
- An Australian passport (if expiry is less than 2 years old)
- A current Australian state/territory proof of age card containing your photograph
- A current passport, similar travel document or national identity card issued by a foreign government department, the UN or an agency of the UN, containing your photograph and either your signature or a unique

<sup>^</sup> If the document and/or the certification is not written in English, it must be accompanied by an English translation prepared by a translator accredited by the National Accreditation Authority for Translators and Interpreters Ltd (NAATI). If you are unable to provide these documents, please call us to discuss alternatives.

## Certification of personal documents

All copied pages of original personal identity documents (including any change of name documents) must be certified as true copies by an authorised person with the appropriate qualifications or registration (see below) who cannot be the owner or addressee of the document. The authorised person must sight the original and the copy to ensure the documents are identical, then certify each page by writing "Certified to be a true copy of the original seen by me", followed by their signature, printed name, address (personal or professional), qualification (e.g. justice of the peace, Australia Post employee), registration number (if applicable) and date. In the case of a multiple page document, the authorised certifier must certify all pages by repeating the above steps on each page and including the numbering of each page (1 of 25).

If you are in Australia

The following lists a subset of people who are authorised to witness your signature on a statutory declaration as well as certify copies of original documents. For a complete list of authorised witnesses/certifiers, go to the Attorney-General's Department website at [www.ag.gov.au](http://www.ag.gov.au).

- Australia Post employee in charge of an office providing postal services (charges may apply)
- chiropractor
- dentist
- financial adviser or financial planner
- full-time or part-time teacher employed at a school or tertiary institution
- justice of the peace
- legal practitioner
- magistrate
- medical practitioner
- nurse
- optometrist
- pharmacist
- physiotherapist
- police officer
- psychologist
- veterinary surgeon.

If you are outside Australia

The following people can certify copies of the originals:

-