

Change of Contribution Rate Percentage

For New and Transport Scheme members

Who should use this form

1. New and Transport Scheme members who wish to change their contribution rate percentage in their defined benefit account.
A Transport Scheme member can only change their rate once every 12 months. A New Scheme member can only change their rate once every 6 months. PLEASE COMPLETE SECTIONS 1, 2 & 4.
2. New and Transport Scheme members who wish to vary their current defined benefit fund contribution deduction type from after-tax to before-tax (salary sacrifice)* or vice versa. Pleaser refer Section 3. PLEASE COMPLETE SECTIONS 1, 3 & 4.

* For eligible members only. Please visit our website at www.esssuper.com.au or contact your employer.

Before you start

You can complete this form online, or alternatively your completed form can be forwarded to ESSSuper by fax, mail or email (if emailing the form you will need to print the form, sign it then scan it and send to info@esssuper.com.au)

Please complete this form in pen using CAPITAL letters and mark with an [X] where applicable.

Section 1

Your personal details

Member number

Title

 Mr Mrs Ms Miss Other (please specify)

Surname

Given names

Date of birth

 / /

Postal address

Suburb

State

Postcode

Mark with an [X] if your postal and residential address are the same. If your residential address is different, please specify below.

Residential address

Suburb

State

Postcode

Telephone (business hours)

 ()

(after hours)

 ()

Telephone (mobile)

Email address



By providing your email address you are authorising ESSSuper to send communications including statement notifications to that address. This authorisation will apply until it is revoked by you.

Section 2

Contribution rate percentage change

I elect to change my contribution rate to: (please tick one box only)

New Scheme members

AFTER TAX

 0% 3% 5% 7% (conditions apply*)**OR**

BEFORE TAX

The applicable salary sacrifice rates for the above are:

 3.6% 5.9% 8.3%**Transport Scheme members**

AFTER TAX

 0% 2.5% 5% 7.5% (conditions apply*)**OR**

BEFORE TAX

The applicable salary sacrifice rates for the above are:

 3% 5.9% 8.9%

* Conditions for contributing at 7% (New Scheme) or 7.5% (Transport Scheme):

You can elect to contribute 7% or 7.5% if you:

- are a prescribed class officer. Prescribed class members are custodial officers, prescribed fire-fighters, child adolescent and family welfare officers or certain police officers who meet the specification under the *State Superannuation Regulations 2008*; or
- have not accrued a retirement benefit which exceeds that which would have built up if you had contributed at 5% of salary over your period of service.

- A Transport Scheme member can only change their rate once every 12 months.
- A New Scheme member can only change their rate once every 6 months.
- If your election form is received in time to be processed by the 14th of the month, the new rate will take effect from the start of the next month. Otherwise it will be the start of the following month.

Section 3

Vary type of contribution deduction

Complete this section if you are making contributions and wish to switch between after-tax contribution and salary sacrifice contributions.

Change from after-tax contributions to salary sacrifice (pre-tax) contributions

OR

Change from salary sacrifice (pre-tax) contributions to after-tax contributions

If your election form is received in time to be processed by the 14th of the month, the new rate will take effect from the start of the next month. Otherwise it will be the start of the following month.

Section 4

Declaration and signature

I acknowledge and agree that:

- I have read and accept the statements relating to privacy (and in particular to the collection, use and disclosure of personal information by ESSSuper) appearing in the ESSSuper privacy statement available from the ESSSuper website at www.esssuper.com.au
- I fully understand and accept the implications of the election I have made on this form and I declare that the information provided on this form is true and correct.
- The rate I have nominated on this form will be deducted from my pay each pay period by my employer until I lodge a new election form or I terminate employment.
- ESSSuper is not responsible for ensuring that deductions are made and forwarded to ESSSuper by my employer.
- The information provided by ESSSuper is of a general nature and does not constitute personal financial advice.
- I am aware that concessional contribution caps do apply, and I have considered obtaining independent financial advice in respect of my superannuation options.

Signature



Date

/ /

This form must be forwarded to ESSSuper and **not** to your payroll office.

Please forward this completed form to

ESSSuper GPO Box 1974, Melbourne Vic 3001

T 1300 655 476 | F 1300 766 757 | www.esssuper.com.au

At ESSSuper, we treat the privacy and confidentiality of our members' personal information seriously. We are committed to complying with the guidelines of the *Privacy and Data Protection Act 2014* and the *Health Records Act 2001 (Vic)*. To obtain a copy of ESSSuper's privacy policy go to our website at www.esssuper.com.au