

Australian Expatriate Superannuation Fund

Change of Member Details

Form **5**

The Trustee

will only accept this form if it is correctly and fully completed.

Any questions, call
Member Services 1300 323 489

Please note

Please use this form to notify (AESF) Australian Expatriate Superannuation Fund of your new residential address, mailing address, name change or contact details. Please complete all relevant sections using BLOCK CAPITALS and using BLACK INK and signing where indicated.

Please refer to the frequently asked questions at the back of this form to assist you with completing it.

1. Member Details

Member number

Title

Mr

Mrs

Miss

Ms

Other

Name [first name, middle, surname]

If your name has changed, please provide certified evidence with this form. (e.g. marriage certificate)

Date of birth [dd/mm/yy]

2. New Address Details

New Residential address

Unit / Street number

Street name

Suburb / Town

State

Postcode / ZIP code

Country

(If your country of tax residency has changed, please complete the **APSS241** on our website www.ivcm.com **QROPS policies ONLY**)

The new address is to take effect:

Immediately

OR from

DD/MM/YYYY

Issued by the Trustee
Tidswell Financial Services Ltd
ABN 55 010 810 607
AFSL 237628
RSE Licence L0000888

3. Mailing Address Details

Tick if address is same as above

OR (If different from above)

Mailing Address

--	--

Unit / Street number

Street name

--	--	--

Suburb / Town

State

Postcode / ZIP code

Country

--

4. Previous Address Details

Previous Address

--	--

Unit / Street number

Street name

--	--	--

Suburb / Town

State

Postcode / ZIP code

Country

--

*(If your country of tax residency has changed, please complete the **APSS241** on our website www.ivcm.com **QROPS policies ONLY**)*

5. New Contact Details

New Email Address

--

New Home Telephone Number

--

New Mobile Number

--

Please note

Please review the document certification requirements guide for assistance in certifying your identification documents. This can be found on our website www.ivcm.com

6. Verification of Change of Name

We shall require evidence of any name change by supplying the original legal document, or a certified copy of the original. When certifying a document, please refer to our document certification requirements guide, which can be found on our website.

7. Verification of Residential Address

We are required to obtain evidence and verify your new residency address to protect your data. We can accept any of the following documents, either by an original document or a certified copy of your new residential address.

Please tick **(one)** the relevant box in accordance with the new residential address document you shall be supplying with this form. Please also tick if you are supplying an original document or certified copy.

1. I enclose a bank statement with my name shown dated within the last 3 months.
- Original Document Certified Copy
2. I enclose a utility bill (ACCEPTABLE: water, electric, gas, heating, landline telecommunications, council government) dated within the last 3 months. **(Please note: Mobile phone bills are not acceptable)*
- Original Document Certified Copy
3. I enclose a valid unexpired driving license (not provisional).
- Original Document Certified Copy

8. Verification of New Contact Details

Please complete section 5 with all new contact details and sign the Member Declaration in section 10.

When complete

email or post this form:

australia@ivcm.com

IVCM (Aust) Pty Ltd

PO Box 7403
Baulkham Hills
NSW, 2153

9. Checklist of documentation required

- Fully completed change of member details form (original wet signature, copies not accepted).
- Enclosed original or certified copies, fully compliant with our requirements laid out in this form.

10. Member Declaration

I declare that the information provided in this form above are true and correct to the best of my knowledge and belief.

I undertake to inform (IVCM) Australian Expatriate Superannuation Fund (AESF) of any changes therein immediately by completing a subsequent Change of Details form.

I declare and fully understand that in the event of my country of residency changing, I have 60 days becoming (or ceasing to be) resident to notify (IVCM) Australian Superannuation Fund. Failure to do so could lead to further charges where I do not hold (IVCM) Australian Expatriate Superannuation Fund or the Trustees liable to such charges.

Member's Signature

Date [dd/mm/yyyy]

1. When should I complete this form?

You can complete this form to update your residential, mailing address, name change or contact details. If your country or tax residence has changed please see below.

2. I have a (QROPS) policy and have moved jurisdiction since I joined the Australian Expatriate Superannuation Fund, is this the correct change of address form?

No, address changes where your jurisdiction has changed under a QROPS, must be completed on the HMRC APSS241 available on our website www.ivcm.com.

A change of residency jurisdiction under a QROPS may mean:

- That you may have to pay UK tax on earlier overseas transfer or later payment out of the scheme even if you are not resident in the UK.

Or

- That tax you paid on an earlier overseas transfer can be reclaimed from HMRC.

3. I have a (SUPER) policy and have moved jurisdiction since I joined the Australian Expatriate Superannuation Fund (SUPER) is this the correct change of address form?

Yes, if your policy is a (NON-QROPS) i.e. no pension transfer(s) have taken place from a UK registered pension scheme, QROPS or Former QROPS and is built up of contributions from Australia only this form is the correct form to change your residential address.

4. My address is the same but my email and or contact details have changed is this the correct form?

Yes, please complete the form in full and sign the member declaration providing the required documentation stipulated in the change of member details form.

5. My name has changed only is this the correct form?

Yes, please complete the form and provide the necessary documentation as laid out in the form.