MACQUARIE

Macquarie Pension to Super Switch form (existing super accounts only)

Macquarie Investment Management Limited ABN 66 002 867 003 AFSL 237492 RSEL L0001281 Macquarie Superannuation Plan ABN 65 508 799 106 RSE R1004496

Use this form to switch your pension account from income stream phase to accumulation phase using your existing super account in the same product.

This form cannot be used when a new account is required to be opened, please use the online application and switching tool to open new accounts.

- If you wish to refresh your existing pension account with new monies please use the *Pension Update request form* instead.
- Please complete and submit the forms below if you wish to take up other **optional features** that are available on your Super account.
- Existing ongoing adviser and administration fee arrangements will continue on your account.

1. Details of your existing accounts

Account name:

Existing pension account switching **from** account number:

Existing super account switching **to** account number:

2. Transfer details

Amount to be transferred to the super account

Note that while there are outstanding transactions we will be prevented from giving effect to a request for a transfer of the full balance. Your request will not take effect until all outstanding transactions have settled.

☐ **Entire balance** (your Pension account will be closed).

☐ **Partial amount** by one of the following methods:

☐ transferring: $ ______ from your Pension account to your Super account.

OR

☐ leaving: $ ______ in your Pension account and transferring the rest to your Super account.

Mandatory: If you have selected Partial amount above, please specify the assets (including cash) to be transferred out of or remain in your Pension account (depending on your election). If there is insufficient room, please attach an additional page to your request. ***Missing or incomplete information may delay the processing of the switch of asset(s).***

2. Transfer details (continued)

Asset description	Value	Units	Transfer full holding (please ✓)
Cash*	$		☐
	$		☐
	$		☐
	$		☐
	$		☐
	$		☐
	$		☐
	$		☐

Note:

- for listed securities you must transfer the full holding or specify the number of units. You cannot select a dollar value
- term deposits must be transferred in full
- term deposit maturity instructions and dividend reinvestment plans will be reset to 'cash' for all assets transferred. Your adviser will need to update these instructions online.

⚠ Importantly, you must leave the required minimum balance in the account – refer to the Product Disclosure Statement (PDS) for minimum cash balances.

3. Declaration and signature

By completing this form, you accept and agree to be bound by the terms and conditions contained in the relevant Product Disclosure Statement.

Signature 1

Title

Full name

Date

Sign

Wet signature, or

Electronic signature from an approved provider.

Visit Help Centre to view our requirements.

Submit

Upload to **Request Centre** (advisers only)

Email to wrapsolutions@macquarie.com

Mail to **GPO Box 4045, Sydney, NSW, 2001**

Need Help?

If you're an adviser, you can visit **Adviser Help Centre** or chat to us through Adviser Online

If you're a client, you can visit our **Personal Help Centre**, speak to your adviser, or call us on 1800 025 063

BCASD-475 AUGUST 2024