Application and Form Change Update Guide

Effective 9 December, 2025

This document outlines recent updates to application and forms.

The Key changes include:

- Addition of new sections for **Accumulation** and **Pension Applications**
- Updates to three supporting forms

Accumulation Application Inclusion

- Rollover details

Pension Application Inclusion

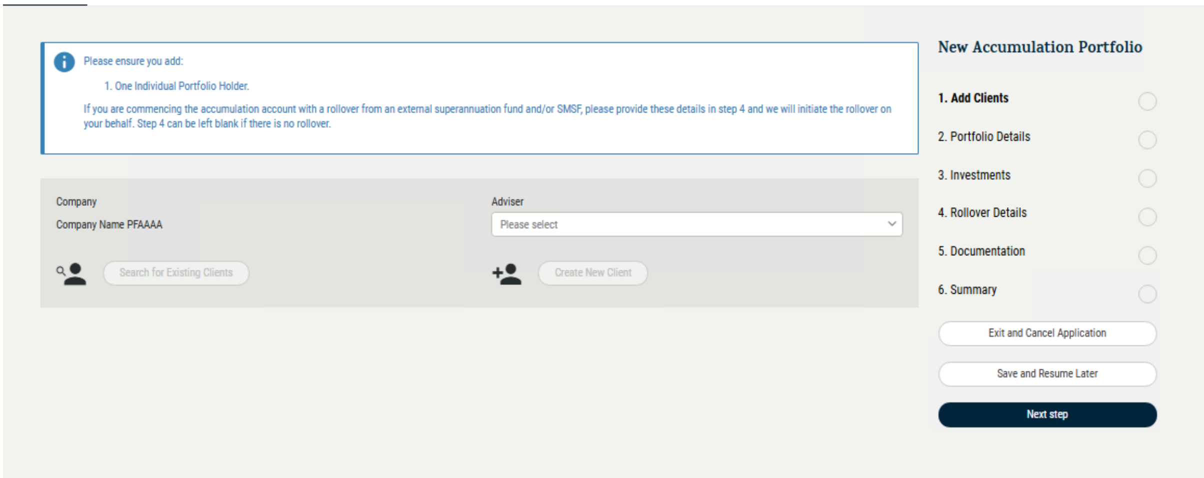
- Rollover details
- Pension entitlement information (including bank details)
- Beneficiary details

Updated Supporting Forms

- Pension Details Form
- Pension Details Form – Adviser Initiated
- Rollover Form

Accumulation Application:

Both the online and paper-based forms have been updated to include rollover details. Multiple rollovers can be added during the application process. Once the application is approved, all specified rollovers will be automatically initiated.



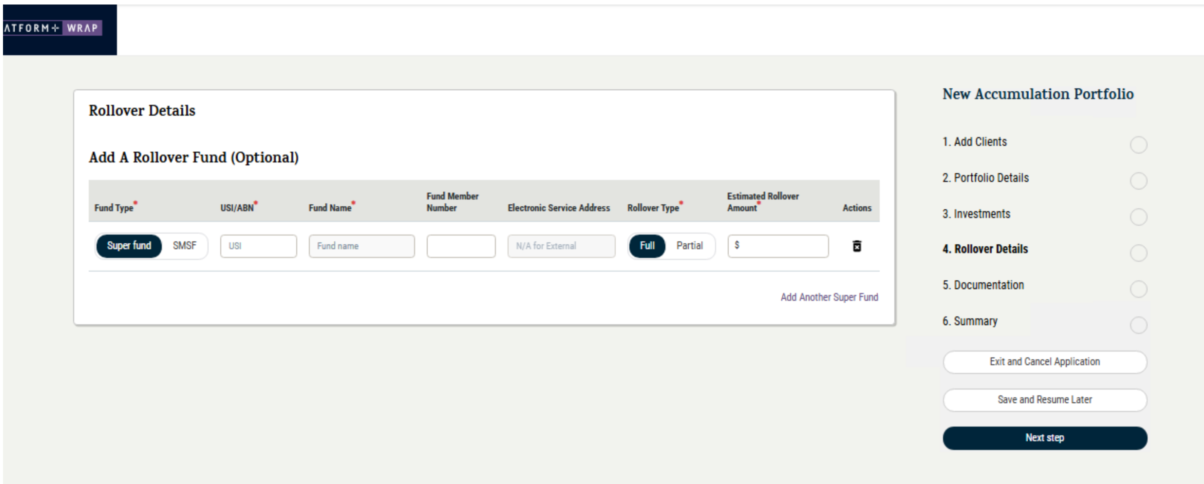
Section 4 – Rollover Details

The inclusion of the rollover details in the application means the rollover form is no longer required.

You can request one or multiple rollovers including either full or partial rollovers from both Super Funds and SMSFs.

Super Fund Rollover

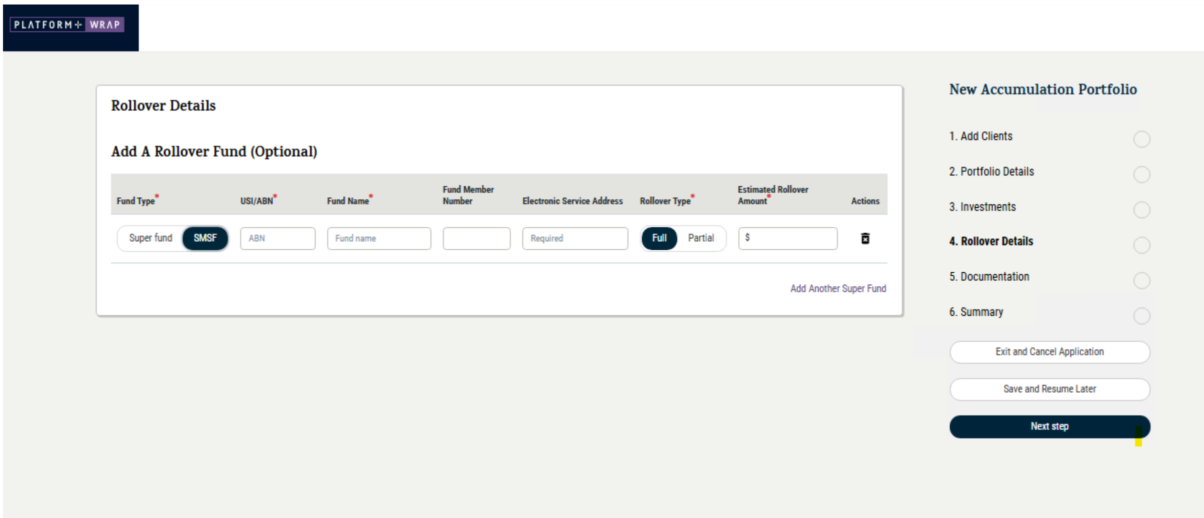
When adding multiple rollovers, select **"Add Another Super Fund."**
The **USI/ABN** field is searchable and will automatically populate the **Fund Name** field.



SMSF Rollover

The **USI/ABN** field is searchable and will verify whether the number entered is valid.

When entering the **Fund Name**, you can include special characters such as **&**.

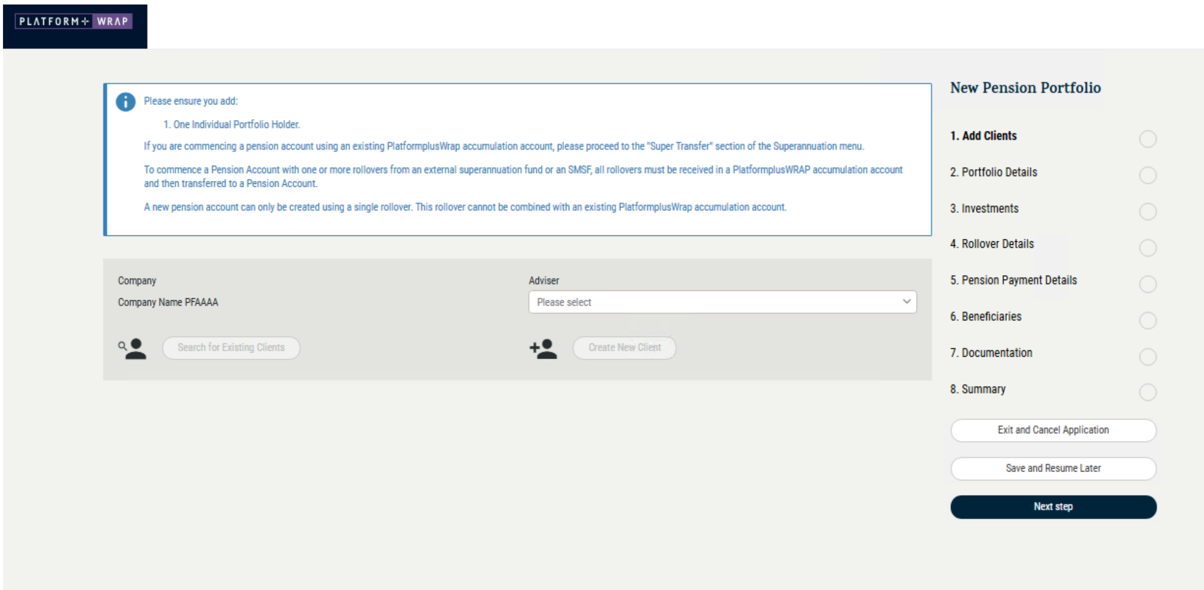


Pension Application

You can request one rollover Super Funds or SMSFs. Where there are multiple rollovers, you will first need to open an Accumulation portfolio and once all rollovers received convert to a Pension portfolio.

The inclusion of the Rollover details and Pension entitlement information (including bank details) is mandatory to submit the application and therefore the supporting forms are no longer required.

For the Beneficiary details, where electing a Binding Nomination as fully completed form is required to be uploaded on the Document section of the application.



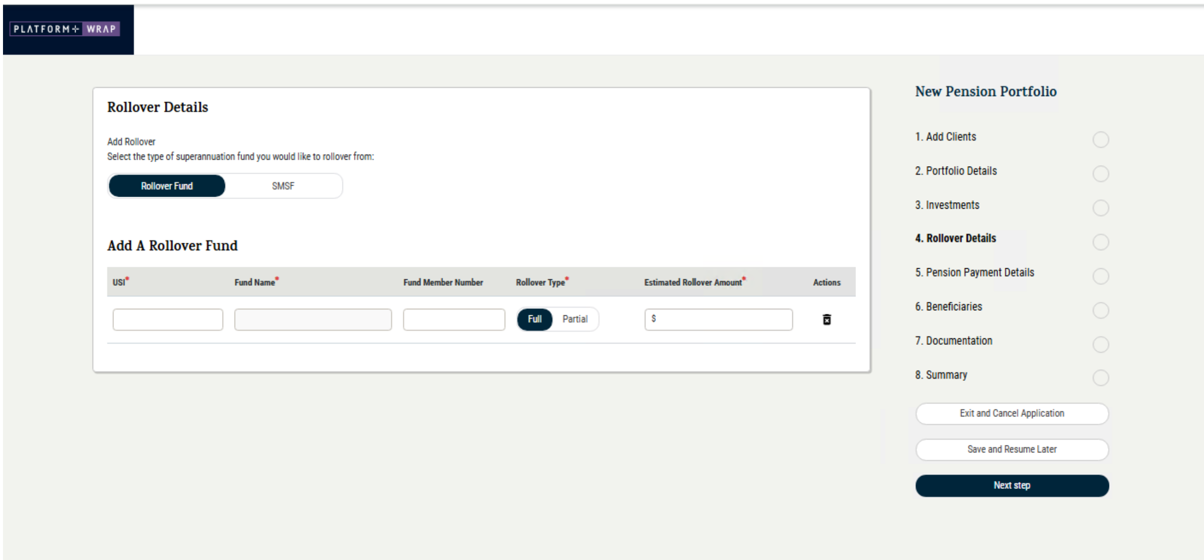
Section 4 – Rollover Details

The inclusion of the rollover details in the application means the rollover form is no longer required.

You can request one rollover, full or partial, from either Super Funds and SMSFs.

Super Fund Rollover

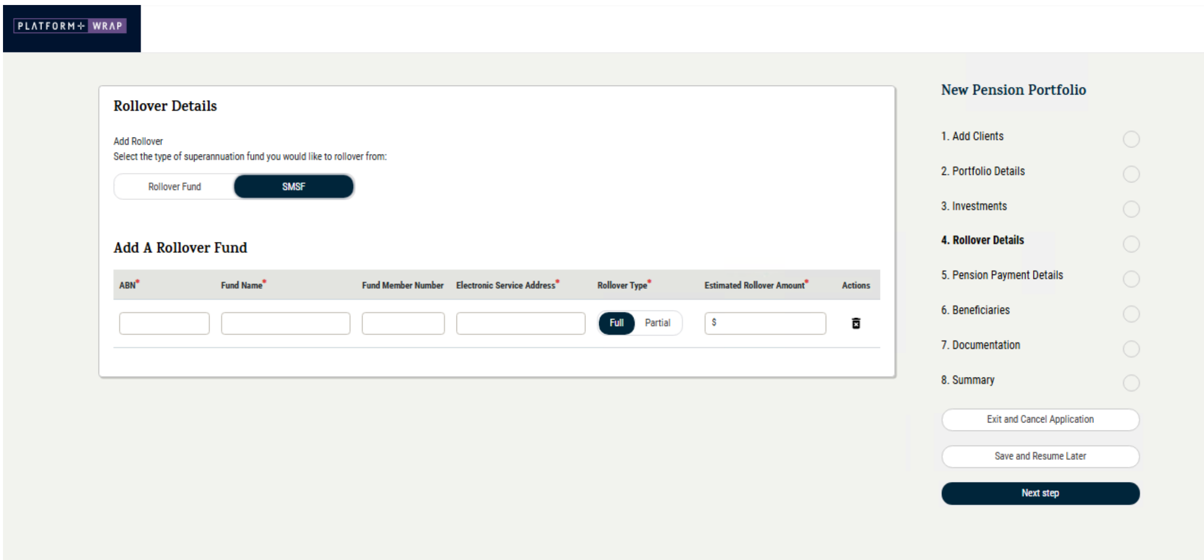
When adding multiple rollovers, select **"Add Another Super Fund."**
The **USI/ABN** field is searchable and will automatically populate the **Fund Name** field.



SMSF Rollover

The **USI/ABN** field is searchable and will verify whether the number entered is valid.

When entering the **Fund Name**, you can include special characters such as **&**.



5. Pension Payment Details

Pension Entitlements

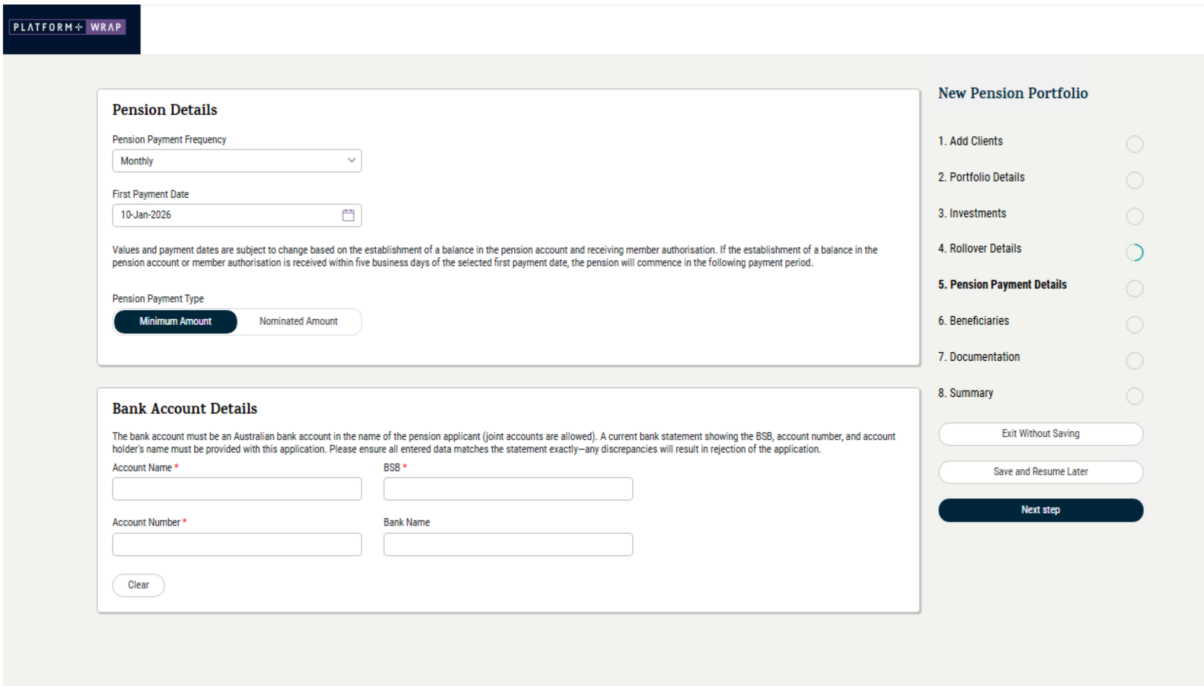
Payment frequency options remain unchanged.

The initial payment date will default to the next available payment date based on the selected frequency. You also have the option to amend this to a future month if required.

If a nominated amount below the ATO minimum is selected, it will now be accepted. However, at the end of the financial year, if the ATO minimum has not been met, an additional payment will be automatically made to the client to ensure compliance.

Bank Account Details

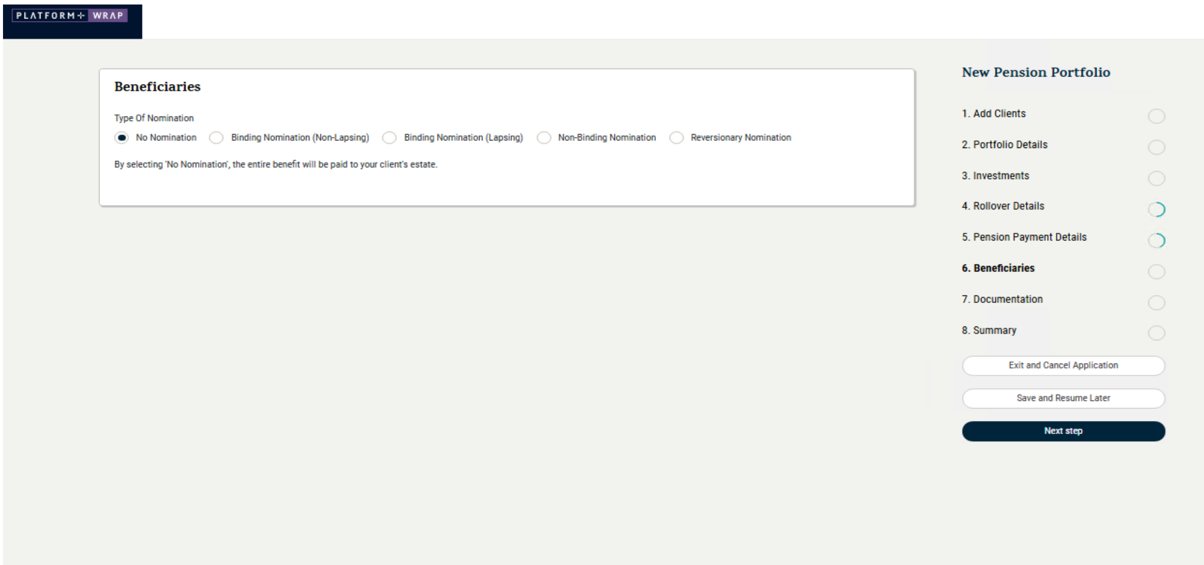
Please ensure all information entered is accurate and upload the supporting bank statement to **Section 7** of the application.
If bank account details are incorrect, a new application will need to be submitted.

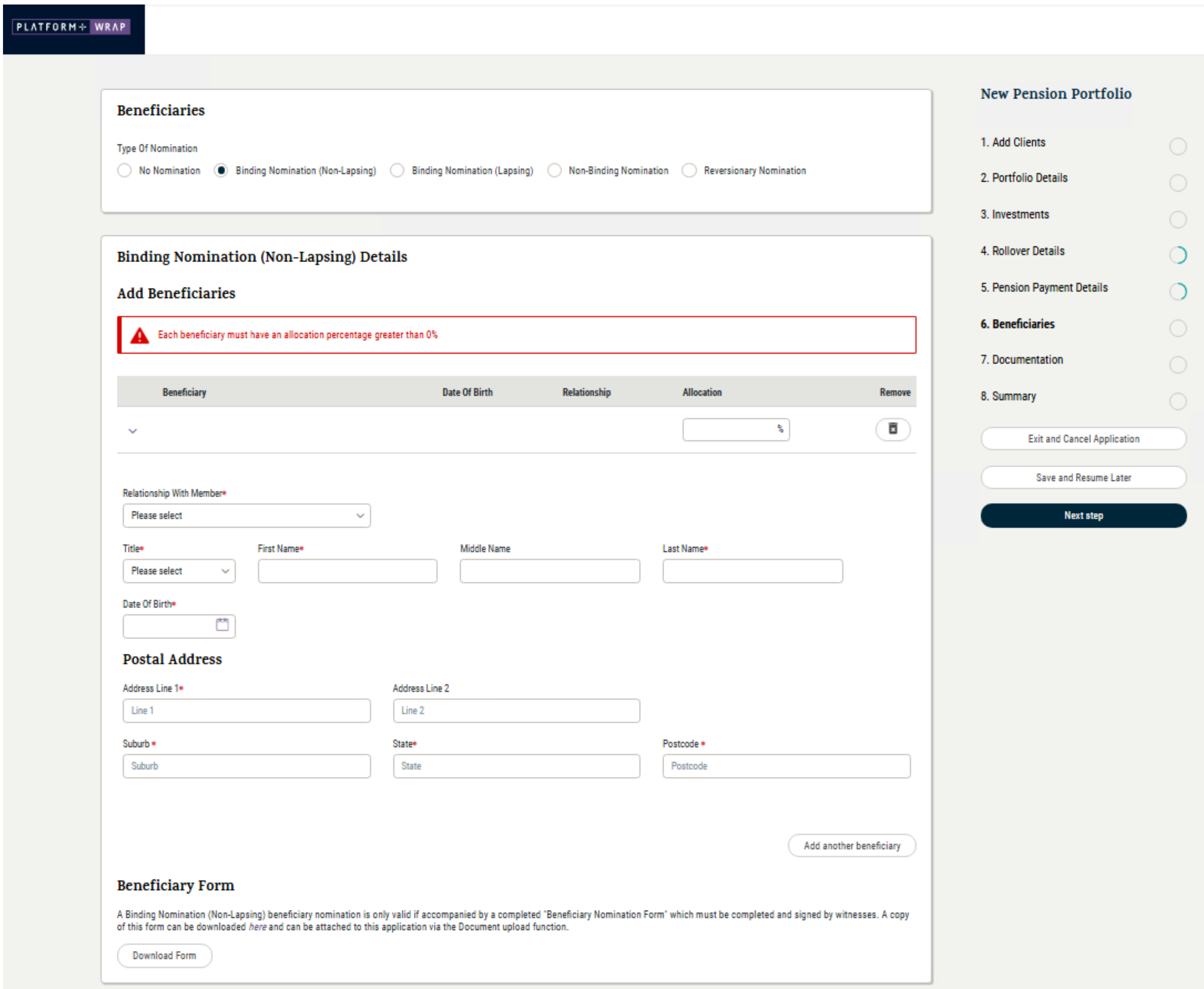


6. Beneficiaries

All beneficiary types require the same information. Below are screenshots illustrating each type of Beneficiary and the information required.

If you are electing a Binding Nomination, a completed Beneficiary Nomination Form must be uploaded in Step 7 of the onboarding wizard.





7 Documents

Please upload the following documents in this section:

- Bank Statement
- Beneficiary Nomination Form (required if a binding nomination has been selected)