



IRIS Change of Income Payment Amount and Frequency form

Step 1. Complete your personal details

Member number:

Surname:

Given name(s):

Daytime contact phone no:

Step 2. Select income payment amount (please tick one box only)

Super Income Stream members:

Government minimum amount **OR** 50% of government minimum amount

Government maximum Amount (10% of account balance for **Transition to Retirement** members. No limit for other members, please select amount below.)

Selected new amount (per payment) \$ _____

Term Allocated Pension members:

Government prescribed amount (Based on your remaining term)

Minimum amount (Your Government prescribed amount less 10%) **OR** 50% of the minimum amount

Maximum amount (Your Government prescribed amount plus 10%)

Select an amount between 45% and 110% of the prescribed annual amount, and above the minimum payment amount _____ % **OR** \$ _____

Please note: You must ensure that the amount selected is within the prescribed limits set by the Federal Government for this financial year. Please refer to the IRIS Product Disclosure Statement or the covering letter accompanying your PAYG Payment Summary.

Step 3 Optional. Select payment frequency (only complete if you wish to change your payment frequency)

a) Please select how often you would like to receive the income payment amount selected above (Step 2). Please tick one box only.

Fortnightly* Monthly* Quarterly** Half Yearly** Yearly**

*This change will take effect from the next available payment period.

**Please nominate the month when you would like the changes to start taking effect: _____

(If no month is nominated, changes will take effect from the next available payment period) *Please turn over to complete form*

b) Please nominate the day of the month you would like to receive the income payment (leave blank for fortnightly payments):

15th **OR** Last day of month

Please note: Subsequent payments will occur on the appropriate anniversary date of the initial payment unless you advise IRIS in writing to amend your next payment.

Step 4 Optional. Select payment drawdown method

Please indicate how you would like to draw down your income payments.

You can:

Specify the proportion to be withdrawn from each investment option or the order of investment options from which you draw your income payments (see below).

Investment Option	%	OR	Order (eg. 1,2,3)
IRIS Defensive Option			
IRIS Conservative Option			
IRIS Growth Option			
IRIS High Growth Option			
IRIS Cash Option			
IRIS Diversified Fixed Interest Option			
IRIS Property Option			
IRIS Australian Shares Option			
IRIS Sustainable Australian Shares Option			
IRIS International Shares Option			
Total	100%		

OR

Elect to withdraw the amounts in proportion to your investment allocations at the time of payment.

If you do not make any nomination above, payment will be the same as your initial investment option.

Step 5. Confirm your instructions

- I declare that I am the IRIS member whose details appear on this form.
- I confirm that the details I have supplied are correct and request the Responsible Entity to pay my income payments as requested and in accordance with the provisions of the Trust Deed.
- I have read the privacy information entitled 'Privacy' contained in the current IRIS Product Disclosure Statement relating to the financial product I have acquired, and acknowledge that the Super Members Investments Privacy Policy is available from the IRIS website at retirewithiris.com.au.

I hereby consent to the collection, use, storage and disclosure of my personal information as described in these documents. I understand that if I do not provide you with the information requested in this form, you may not be able to accept or carry out my requests or instructions.

I/we have read the Privacy Statement contained in the PDS and the manner in which SMI Ltd proposes to comply with the requirements of the Privacy Act 1988 (Cth).

Signature:

Date:

Step 6. Send this form to

**IRIS Administration
Locked Bag 200
Carlton South VIC 3053**

Faxed or emailed requests cannot be accepted.

Should you have any further questions about completing this form, please contact our Customer Service Centre on **1300 367 485** between 8.30am and 5.30pm AEST.

Changing your IRIS income payments may have tax implications. It is strongly recommended that you consult your financial planner prior to making any decisions in relation to your IRIS account.