



ZURICH®

Zurich retirement income products

Change to income payment levels for 2019/20 financial year

Please complete and return this form if you wish to alter your current retirement income payments for the 2019/20 financial year.

1 Investor details

Investment number
.....

Title Surname
.....

Given name(s)
.....

Residential address
.....

State

Postcode

Contact details Work ()
.....

Home ()
.....

Mobile

Email
.....

2 Payment selection

(Please tick) For the balance of the 2019/20 financial year please alter my current retirement income payment to:

Reduced minimum annual payment (ie 50% of the Standard minimum annual payment)

Standard minimum annual payment (ie double the Reduced minimum annual payment)

Other specified amount \$ per (frequency)

3 Declaration

- I understand that the Trustee has an obligation to ensure that, for the 2019/20 financial year, I receive annualised income payments of at least 50% of the Standard minimum annual payment level. In instances where I have requested a reduction to my income stream that will result in less than 50% of the Standard minimum annual payment level being received, the Trustee will increase the remaining income payment by the amount required to ensure this requirement is met.
- I understand that for the 2019/20 financial year, I am required to receive at least the Reduced minimum annual payment, and that this amount must be received as income no later than 30 June 2020.
- I understand that where I have requested a Reduced minimum annual payment, unless the Trustee receives written notification from me to the contrary, income payments will revert to the Standard minimum payment in 2021/22 or such other time as the government announces the Reduced minimum annual payment calculation no longer applies.

Signed

Date / /