

Financial Advice fee deduction form

You can ask ElectricSuper to deduct the cost of financial advice from your Accumulation/Pension Balance.

For Division 2,3 and 4 members, this fee can only be deducted from the Accumulation Balance (i.e. from additional voluntary contributions or rollover balances).

If you need help

For assistance call 1300 307 844 or refer to www.electricsuper.com.au.

Step 1 – Complete your personal details

Please print in black or blue pen,
in uppercase, one character per box.

A



Title Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Date of birth / /

Given names

Surname

Postal address

Suburb

State

Postcode

Telephone

-

Mobile number

-

Email

Membership number

Step 2 – Amount of financial advice fee to be deducted from my Accumulation/Pension Balance

Financial Advice Fee to be deducted:

Fee: \$

☐ I understand and agree this amount will be deducted by the trustee from my Accumulation/Pension Balance and paid to the Financial Adviser nominated.



Step 3 – Attach copy of invoice

You must attach a copy of the invoice issued by your financial adviser which shows the fee charged for the financial planning advice you received. Failure to attach a copy of the invoice means that ElectricSuper will not be able to process your request.

Step 4 – Sign the form

I understand that:

- The amount to be deducted from my Accumulation/Pension balance is solely in relation to financial advice provided to me
- the fee nominated will be deducted from my Accumulation/Pension balance on receipt of all required information
- the value of my Accumulation/Pension balance in the ElectricSuper will decrease by the amount of the fee paid from my Accumulation/Pension balance account in accordance with my request
- ElectricSuper may not be able to action my request where ElectricSuper has been notified of family law proceedings in relation to my super
- I understand and consent to my information being collected, disclosed and used in the manner set out in this form.
- My request will not be processed if:
 - I have not completed all steps of this form; or
 - the amount requested in Step 2 to be paid from my Accumulation/Pension Balance in ElectricSuper is greater than 100% of the fee charged by my financial adviser on attached invoice; or
 - the fee charged is greater than my Accumulation/Pension Balance.

I authorise ElectricSuper to deduct the above amount specified for the financial advice fee from my Accumulation/Pension Balance in ElectricSuper, and to pay this amount to my financial adviser in accordance with the attached invoice issued by my financial adviser.

Signature

Date

/ /

Adviser use only

Adviser name

Adviser's office

Adviser declaration and signature

I confirm that the personal financial advice fee to be deducted from the member's Accumulation/Pension Balance is solely in relation to their super benefits with ElectricSuper.

Signature of adviser

Date

/ /

Step 5 – Return your form

Please return your completed form:

- **By mail to ElectricSuper, GPO Box 4303, Melbourne VIC 3001**
- **By fax on (03) 9245 5827**
- **By email to eiss@mercero.com**



Your Privacy

ElectricSuper is administered by us along with our service provider, Mercer Outsourcing (Australia) Pty Ltd. We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information about the other products and services offered by us and our related companies. If you do not wish to receive marketing material, please contact us on 1300 307 844.

Our Privacy Policies are available to view at www.electricsuper.com.au or you can obtain a copy by contacting us on 1300 307 844.

If you do not provide the personal information requested, we may not be able to manage your superannuation.

We may sometimes collect information about you from third parties such as your employer, a previous super fund, your financial adviser, our related entities and publicly available sources.

We may disclose your information to various organisations in order to manage your super, including your employer, our professional advisors, insurers, our related companies which provide services or products relevant to the provision of your super, any relevant government authority that requires your personal information to be disclosed, and our other service providers used to assist with managing your super.

In managing your super your personal information will be disclosed to service providers in another country, most likely to Mercer's processing centre in India. Our Privacy Policies list all other relevant offshore locations.

Our Privacy Policies set out in more detail how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact us on 1300 307 844 or write to our Privacy Officer, Level 7, 70 Pirie Street, ADELAIDE SA 5000.

