

## ACSRF website (v2\_12)

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Change log

Version	Date	Owner	Notes
2.7	30/03/12	Boomworks	Amendments to wireframes up to v2.7 were provided by Jacky Corio and Kiki Monaha.
2.8	24/05/12	Boomworks	<b>Based on 'RAW_wireframe_design_v1.3_07052012' spreadsheet provided:</b> <ul style="list-style-type: none"><li>Homepage: 'Latest news' replaced 'Videos' in the 'Tools &amp; resources' right hand panel. 'Why join?' has been replaced with 'Why joins us?'. Callout added to note that the Search button on the homepage takes the user to the 'Search results' page.</li><li>The link 'All seminars and events' on the homepage links the user to the 'Seminars and events' page with the All states tab (defaulted).</li><li>Tagline next to logo has been updated to be 'An industry super fund for all Australians'.</li><li>Supertabs: Removed 'Who can join?' under 'Our super offer' and 'Our allocated pension offer' columns. 'Investment choice' changed to 'Pension investment choices' under 'Allocated pension investments' column. 'Allocated pension' added to beginning of 'investment choices', 'performance' and 'unit prices' under 'Allocated pension investments' column. Supertab subpage names updated to reflect in Site map.</li><li>'What is super?' page: Callout added to note rating stars are defaulted to zero, not two. (Star ratings image is indicative only.)</li><li>'Our super offer' and 'Our allocated pension offer' pages updated for a combined table for Estimated costs and Estimated buy-sell. (Body content in wireframes is indicative only and updates should be done in CMS.)</li><li>Right panel calculator names updated to current calculators.</li><li>'Super performance' page: Table headings for years shortened to MonYY (instead of Full month name + YYYY). Added callout that table redesign is pending a business requirements change request approval.</li><li>'Super unit price' page: The heading of the first column has been updated to 'Current unit prices'. Added callout that table redesign is pending a business requirements change request approval.</li><li>'Forms &amp; documents' changed to 'Forms &amp; documents'.</li><li>'Forms &amp; publications' page: 'Newsletters' and 'Annual reports' have been added as new tabs to accommodate ACSRF newsletters, current and previous annual reports. Callout added to note that newsletters will display for all users.</li><li>Onscreen message has been updated in case there are no seminars available.</li><li>'Register for a seminar' form: 'Job title' field removed, 'Gender' field added (provided age ranges have been included in the dropdown menu). 'How did you hear about our seminars?' replaced 'How did you know about ACSRF's seminars?'. Callout added to note that 'Business requirements change request approval will modify the form fields displayed'. Callout added to note that 'There is no restriction on number of companion attendees that can be registered for'.</li><li>FAQ questions behave as compactors thus more than one item can stay expanded in the page.</li><li>'Tools &amp; resources' page: 'Latest news' replaced 'Our newsletters'.</li><li>'Financial planning services' page': As SSO in currently not available, 'Client ID' and 'Last name' fields will be displayed in page and the submit button will link the user to the third party <i>Ask and Adviser</i> website.</li><li>'My account' pages: Callout added to note that when users (all segments - superannuation, pensioners and employers) click on 'logout', they will be directed to the homepage. Calculator names updated. Callout added to note that 'My account' pages will only be active once SSO becomes available in a future phase.</li><li>'My account' super and employer pages: New heading, link and button wording suggested for financial advice module.</li><li>'My account - employer' page: The module 'Ask an adviser' has been removed. 'Members online' changed to 'Employers online'. 'What can you do' list in the Employers online banner has been updated to reflect the list in the 'RAW wireframes design requirements' document 10/05/12.</li><li>'Join online as super member' forms have been updated to reflect the 'RAW wireframes design requirements' document 10/05/12.</li><li>'Join online as pension member' page has been updated to reflect the 'RAW wireframes design requirements' document 10/05/12.</li><li>'Join online as an employer': Above submit button, wording has been added for 'The information you provide will be treated in accordance with our <u>Privacy Policy</u>.'</li><li>'Contact us' page: Immediately above email us form wording has been amended to: 'Our Customer Service team will respond within three working days.' Callout added to note that all branches information will display for a state when the state is selected from the 'Locate us' map or 'Select your state' dropdown menu.</li><li>'Let us call you back' lightbox: wording has been updated to reflect the 'RAW wireframes design requirements' document 10/05/12.</li><li>The page 'Our services' has been renamed to 'Our employer offer'.</li><li>'Book a workplace visit' has been moved under 'Our employer offer' and reflected on Site map.</li></ul>
2.9	01/06/12	Boomworks	<b>Based on phone conversation with Leanne Hartley on 29th May 2012 and revised spreadsheet provided 'RAW_wireframe_design_v1.4_29052012':</b> <ul style="list-style-type: none"><li>Site map lower casing and item numbers for various items corrected.</li><li>Homepage: Callout text for right panel 'Forms and publications' link updated to say it will link the user to the 'Forms &amp; publications' page with 'Products Disclosure Statements' tab displayed by default.</li><li>'Homepage – logged in' page removed as there is no Single Sign-On (SSO) available in this phase.</li><li>'Homepage – hovers' page: hover for Login button removed as button now directs to static Login page.</li><li>'Login page' - Login box removed. Added static text with links for Members Online and Employers Online.</li><li>'Our super offer' page: Second column heading changed to "Estimated investment management costs". "Australian Shares" updated with a capital 'S'.</li><li>'Super performance' page: Fixed all references to "Australian Shares" with a capital 'S'.</li><li>'Super unit prices' page: Search for past unit prices should be last "12 months". Tab 1 corrected to 'Current unit prices'. Field label for investment dropdown values to read "Investment option" (not 'type').</li><li>'Our employer offer' page: Breadcrumb corrected.</li><li>'Book a workplace visit' page: Wording modified to "How did you learn about our workplace visits?".</li><li>'Managing your employees' super' page: Breadcrumb corrected.</li><li>'Forms &amp; publications' page: order of tabs is changed to 1. Product Disclosure Statements, 2. Forms, 3. Newsletters, 4. Annual reports and 5. Document archive. Product Disclosure Statements tab is the default displayed.</li><li>Seminars &amp; events: All references to subscription alerts removed.</li><li>'General info &amp; FAQs' page: Casing and spacing amended for various words.</li><li>'Financial advice online' page: Heading above login fields amended to 'Access free financial information online'.</li><li>'Let us call you back': Consultants replaced with "Customer Service Officers" and call centre opening hours - should read (National public holidays excluded) ie remove "and NSW"</li><li>'FAQ' page: investments and insurance compactors have been removed</li><li>'FAQ' page: tabbed view has been designed to accommodate higher number of questions.</li><li>'Join online - session timed out' page: 'Join as a pension member' replaced "'Join online as a pension member'</li><li>Book a workplace visit – confirmation: call to action has been renamed to 'Go to Home' and it will link the user to the homepage.</li></ul>

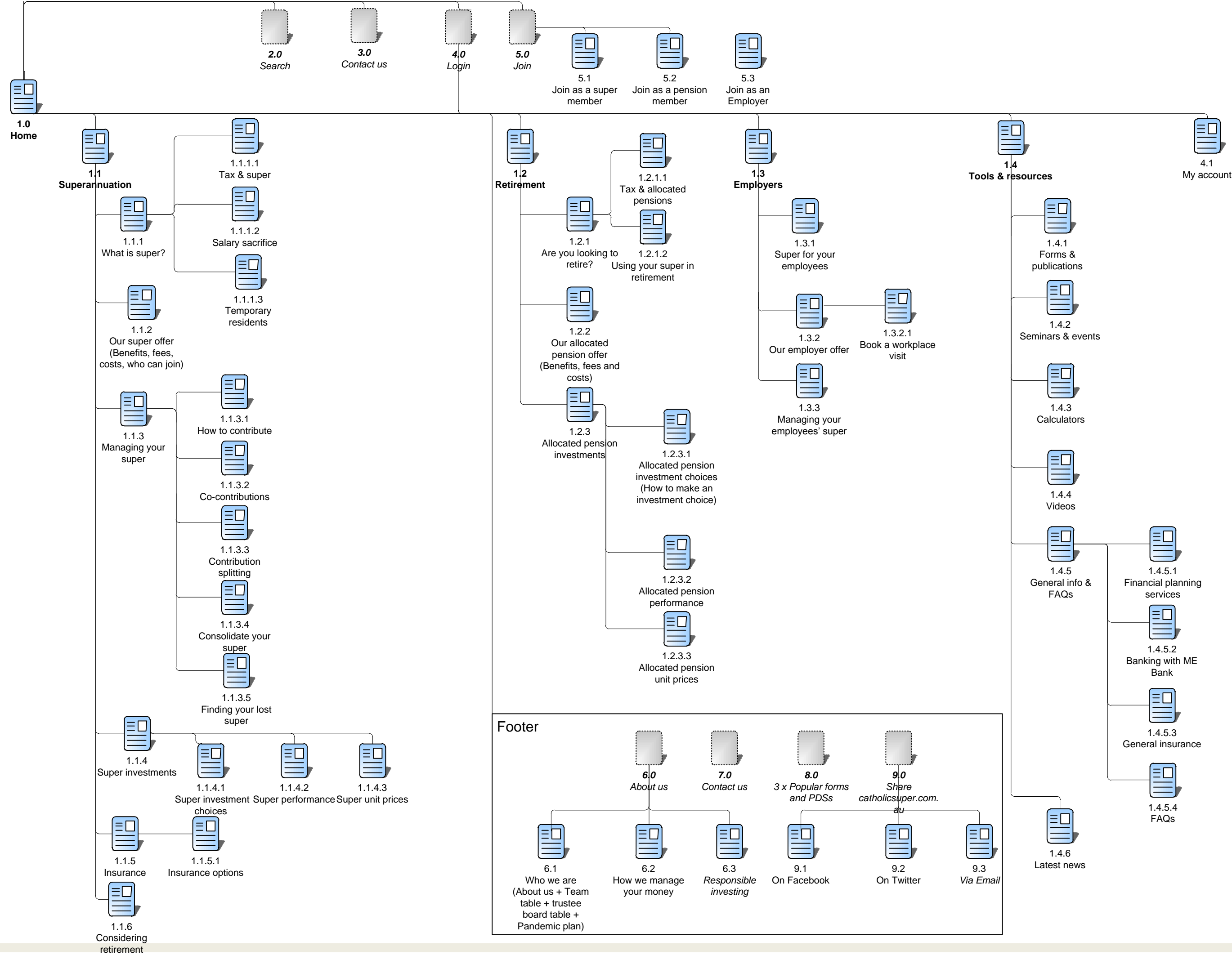
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Version	Date	Owner	Notes
2.9	01/06/12	Boomworks	<ul style="list-style-type: none"><li>‘Join online as a super member’ step 6: default investment option has been removed. And the wording ‘The information you provide will be treated in accordance with our Privacy Policy.’ has been included.</li><li>‘Join as a pension member’ page: The wording ‘The information you provide will be treated in accordance with our Privacy Policy.’ has been moved before the main call to action ‘Please call me back’.</li><li>‘Join online as an employer’ page: Mobile is no longer a required field.</li><li>‘Trading name or company’ has been changed to ‘Trading name of company’.</li><li>‘Continue a saved application’ page: ‘If either email or reference number are not accurate, the following message displays: ‘The email address or reference number you have entered is incorrect. Please try again’.</li><li>‘Error - Page unavailable’ page: error message has been update</li><li>‘Contact us’ page: Opening hours wording has been changes to ‘From Monday to Friday, between 8:30 am and 7:00 pm AEST [8:30 am–8:00 pm AEDT] (National public holidays excluded).’</li><li>‘Search results’ page: Australian Catholic Superannuation replaced ACSRF.</li><li>‘Contact us – multiple branches’ and ‘Contact us – state with no branches selected’ pages added.</li></ul>
2.10	06/06/12	Boomworks	<p><b>Based on ‘RAW_wireframe_design_v1 5_05062012’ spreadsheet provided by Leanne Hartley on 5th June 2012</b></p> <ul style="list-style-type: none"><li>Leanne confirmed that generic error message styles will apply across all forms. Where data entered for a field is not valid, message will read "This field entry is not valid".</li></ul> <p><b>Based on ‘ACSRF Website Business Requirement v1.11_Final_06052012’ document provided by Leanne Hartley on 5th June 2012</b></p> <ul style="list-style-type: none"><li>Unit prices past search: Default past search date range is four weeks back from the current date.</li><li>‘Let us call you back’ page: ‘What is your enquiry about?’ dropdown menu has been added.</li><li>Presenter info lightbox has been added and includes the following: Title, First name, Last name, Position, Company and Phone no.</li><li>‘Seminars &amp; events’ page: If seminar is ‘Booked out’ i.e. when available seats = total seats, then session will be removed from live site. If more seats are released to that session and end date has not yet been reached, then session will display on live site.</li><li>Register for a seminar form: ‘Title’ dropdown field has been added. Address is a compulsory field. ‘Additional attendees’ fields have been included.</li><li>Join online as a super member form – Step 3 – Investment choices – removed check box “I would like to make an appointment with a financial planner to discuss my investment options. (Please note that this may incur an additional cost.)”.</li><li>Investment performance: ‘2010/11 - Monthly returns’ table displays 12 months.</li><li>Past unit prices search results page examples added for ‘All investment options’ and ‘Cash’ (one investment option).</li><li>Annual return for previous financial year – column date format = 01 Jul yy to 30 Jun yy) - Right hand column has been removed to accommodate the table that displays 12 columns for the table ‘2010/11 - Monthly returns’.</li><li>Past investment returns table: The column ‘CPI 5-year average’ has been added to the wireframes. The Past investment returns tab will only display the previous five financial years returns.</li></ul> <p><b>Based on Leanne Hartley’s email on 7th June 2012</b></p> <ul style="list-style-type: none"><li>Seminars and events page: Postcode does not need to display on page. Seats available only display within CMS against each seminar session (see existing CMS screenshot below)</li><li>‘Let us call you back’ lightbox: Maximum number to display in lightbox = 5.</li></ul> <ul style="list-style-type: none"><li>Seminars and events page has been aligned to visuals including the cost indication for each seminar.</li></ul>
2.11	19/06/12	Boomworks	<ul style="list-style-type: none"><li>Latest news pages have been integrated to the pack.</li><li>Feedback rating and comments box design has been updated to reflect possible Ektron functionality.</li></ul>
2.12	26/06/12	Boomworks	<p><b>Based on Leanne Hartley’s email on 25th June 2012</b></p> <ul style="list-style-type: none"><li>As per Leanne Hartle’s request, wireframes have been checked one more time in order to ensure initial cap on ‘Shares’ throughout site for Australian Shares and International Shares. No change has been made as wireframes were accurate.</li><li>‘Past unit prices’: it has been ensured that there is no initial capitals on the words ‘Past investment returns’. No change has been made as wireframes were accurate.</li><li>Seminars and events – contact info lightbox: Up to 5 presenters can be added.</li><li>‘Location map &amp; contact info and Presenter info links will be presented on the seminar registration form.</li><li>Presenter info lightbox: details to display for a presenter in the lightbox will be Title, First name, Last name, Position.</li><li>‘Let us call you back’ lightbox: ‘What is your enquiry about?’ is a required field.</li><li>Monthly returns table: space has been deleted between the return figures and the ‘%’ symbols in the table.</li></ul>

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Queensland

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23 Apr 2012 | Investment Magazine: ACSRf cuts custodian shortlist to four

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1It takes the user to the 'Search results' page.

2Promotional banners will rotate every 7 sec, Banner will pause on mouse over. Boomworks recommends to keep the tagline 'An industry super fund Open to all Australians' as default banner.

3User can select banner using the three navigation buttons which will stop the rotation unless user refreshes the page.

4Fold (800x600)  
It links the user to the 'Seminars and events' page with 'All states' tab displayed by default.

5Fold (1024x768)  
It will link the user to the 'Forms & publications' page with 'Products Disclosure Statements' tab displayed by default.

6It will link the user to the Latest news landing page with 'Industry news' tab displayed by default.

7Scrolling newsfeed code is from a third party source. ACSRf will manage its display and content, including links to internal articles through their third party news portal source.

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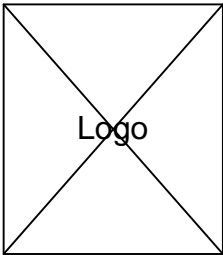
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1 Clicking on the 'Join' and 'Login' button, hover box will be displayed

2 It will link to the static login page.

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- Retirement
- Employers
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You are here: Login

## Login

To access your account details online, please select one of the link options below:

- [Members Online](#)
- [Employers Online](#)

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1 It will link the user to the Bluedoor members or employers login pages.

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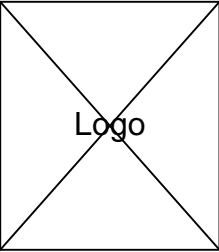
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You are here: Superannuation

**What is super?**

The Superannuation Guarantee (SG) of 9% is payable by your employer provided you earn more than \$450 in a calendar month.

[More about superannuation](#) >

[Tax & super](#) | [Salary sacrifice](#) | [Temporary residents](#)

**Our super offer**

We provide 11 investment options that can be diversified. If you need to change your existing investment, you can easily switch to something more conservative or with stronger growth potential.

[More about our super offer](#) >

**Managing your super**

You could manage your super fund in different ways.

[More about managing your super](#) >

[How to contribute](#) | [Co-contributions](#) | [Contribution splitting](#) | [Consolidate your super](#) | [Finding your lost super](#)

**Super investments**

Find out how your ACSRf investments have been performing.

[More about super investments](#) >

[Super investment choices](#) | [Super performance](#) | [Super unit prices](#)

**Insurance**

One of the best benefits of being a member of ACSRf is the wide range of insurance cover options.

[More about insurance](#) >

[Insurance options](#)

**Considering retirement**

If you are getting closer to retirement, here is some useful information on what you should consider.

[More about considering retirement](#) >

**Super tools**

[Super forms](#)

[Superannuation Product Disclosure Statement](#)

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All tools and resources

**Related links**

[Super PDS \(PDF 280KB\)](#)

[Transtion to retirement form \(PDF 280KB\)](#)

[Financial advice](#)



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Tools & resources

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1 Superannuation related tools will be presented on the right-hand column

2 It will link the user through the 'Forms & publications' page – Forms tab with 'Super members forms' expanded

3 It will link user to the sub-landing page (2<sup>nd</sup> level of navigation)

4 It will link user to the third level of navigation

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Managing your super >

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The total value of assets in the Australian superannuation system has now grown to over \$1 trillion. Superannuation is one of the most tax-effective investments you can make for your retirement.

For many people as they enter retirement, their superannuation balance will be the second largest investment they will have accumulated, next to their home. The following three pillars make up the Australian Government's Retirement Incomes Framework:

**Compulsory employer superannuation**  
The Superannuation Guarantee (SG) of 9% is payable by your employer provided you earn more than \$450 in a calendar month. (Age limits apply.)

**Age pension**  
The maximum age pension applicable from 1 July 2008 to 19 September 2009 is:

Single: \$575.80 per fortnight.

Couple: \$957.80 (\$478.90 each) per fortnight.

There is an age test, assets test and income test to be eligible for a full or part age pension.

**Voluntary superannuation**  
Voluntary superannuation contributions can be either your personal before-tax (salary sacrifice contributions), after-tax contributions, self-employed contributions, spouse contributions and the Government co-contribution.

The higher your superannuation balance, the more you will have to spend in retirement. Planning now can make a large difference to the amount of super you will have when you retire. Why not take advantage of the Government incentives along the way. Where else can you reduce your income tax and create a tax free comfortable retirement lifestyle from age 60?

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Superannuation Plan Product Disclosure Statement – 01 Jul 2011 (PDF 280KB)

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Your rating

Poor

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Our super offer

How to contribute

Super calculators

Salary sacrifice

Calculate your super

All calculators

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Did you know that...?

We are the largest Catholic industry super fund in Australia and we are open to anyone eligible for superannuation.

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SUPER RATINGS PLATINUM SUPER 2011

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1When user scrolls the page down, the left-hand-nav will follow the scrolling of the page.

2In the content pages 5 different types of widget can be put in the RHP

3Related links could include:  
- Link to content page  
- Links that open PDFs and forms

4It will link the user through the 'Join as a super member' page.

5Fold (800x600)  
'Download' attachments appear if there are documents / forms strictly related to the article.

6Fold (1024x768)  
Related PDSs and forms will be listed here ordered by relevance

7Rating is defaulted to 0. Textual comment box will always be shown.

8Comment box expands when user clicks on 'Additional comments'

9The confirmation message 'Thank you for your feedback' will be shown if user clicks 'Send' button to submit a rating and/or comment.

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You may be able to save tax by arranging with your employer to make salary sacrifice contributions to your super account instead of paying the money to you as salary. Some employers limit the amount of salary you can sacrifice to super, so check with your employer before starting.

When salary sacrificing, you need to make sure that the total of your concessional contributions (i.e. Superannuation Guarantee plus other employer contributions PLUS salary sacrifice contributions) does not exceed the concessional contributions cap. If you exceed the cap, you will pay penalty tax.

Salary sacrifice contributions are made from your pre-tax income, which reduces the amount of income tax that you would normally have to pay. However, these contributions are taxed at 15% on entry to the Fund, so there may be no benefit in salary sacrificing if you are on a low income. As a general rule, the higher your marginal tax rate, the more you can benefit from salary sacrificing.

Salary sacrificing is not suitable for everyone. If necessary, you should seek professional advice before making a decision.

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Guide to pre-tax super contributions (PDF 280KB)

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An ACSRF super account will provide you with the following benefits:

an industry fund, managed for the benefit of members

a choice of 11 investment options

strong investment returns

low fees and costs

flexible and affordable insurance

allocated pensions for retired members and those transitioning to retirement

access to your account via Members online

member education through workplace visits, seminars & events, online calculators

fee for service financial planning

access to a range of benefits including Ask an Adviser, banking and general insurance products

a Platinum rated (the top level available) fund by SuperRatings.

Fees & costs v

We charge you only what it costs to manage the Fund. We do not pay dividends to shareholders or commissions to advisers.

The following fees and costs will apply:

a weekly administration fee of \$1.50

operating costs of approximately 0.20% of your account balance per year

estimated investment management costs ranging from 0.07% to 0.87% of your account balance per year (see the table below for details)

a fee of \$35 for each lump sum withdrawal

a Family Law withdrawal fee of \$70.

Estimated investment management costs

These costs cover the fees charged to the Fund by investment managers, consultants and the custodian. They include an estimated amount for performance based fees that will only be paid if investment managers outperform their targets.

Buy-sell spreads

We normally apply a buy-sell spread to unit prices to cover the cost of buying and selling assets e.g. if you change your investment mix.

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2

It links the user through the "Super performance" page

3

It links the user through the "Insurance options" page

4

It links the user through the relate pages in Tools & resources – General info

5

Compactors are collapsed by default when user lands on the page

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Investment options	Estimated investment management costs	Estimated buy - sell
Diversified Shares	0.73%	0.50%
Growth	0.79%	0.54%
Balanced	0.78%	0.58%
Socially Responsible Balanced	0.80%	0.44%
Conservative Balanced	0.66%	0.42%
Conservative	0.49%	0.28%
Australian Shares	0.61%	0.32%
International Shares	0.87%	0.72%
Diversified Property	0.75%	2.06%
Diversified Fixed Interest	0.36%	0.00%
Cash	0.07%	0.00%

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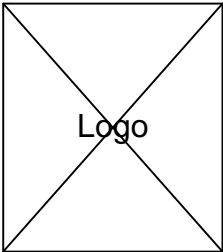
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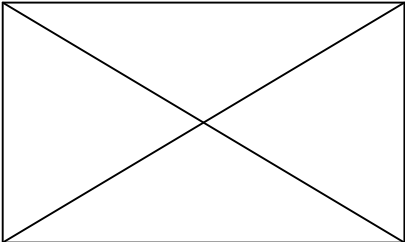
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## Consolidate your super

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If you have changed your employment, you might have a number of different super accounts from previous jobs. Having multiple funds could be costing you extra in administration fees. And of course you run the risk of losing track of some of these accounts.

You can transfer (rollover) any inactive accounts to your ACSRf account – we can even do the work for you.

Before you ask us to transfer your inactive accounts, you should consider whether any of these accounts offer benefits that you want to keep. For example, if you have insurance with another fund, you should not transfer out of that fund until we have confirmed that you have the insurance you need within ACSRf.

If you need help in deciding whether to consolidate your different accounts, you can arrange a meeting with our [financial planners](#).

To start the transfer process, simply download a Rollover to ACSRf form. Once you return the form, we will contact your other funds and arrange for the transfer

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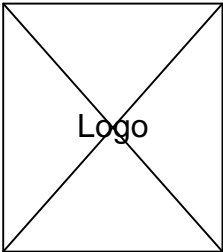
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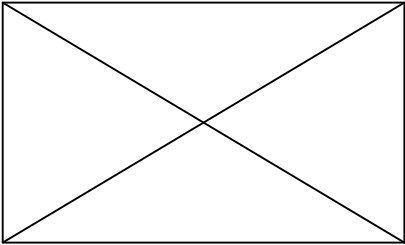
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## Finding your lost super

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Could you have money in other super funds that you have lost track of? It is quite possible if you have changed jobs in the past and did not transfer your account balance to your new employer's fund.

The good news is that the Australian Taxation Office (ATO) provides a **free** service to reunite you with your lost super (there is no need for you to pay someone else to find your lost super).

You could visit the ATO website for this service by clicking on the button below.

Find your lost super 1

If you find any lost super, let us know and we will help you transfer it into your ACSRf account.

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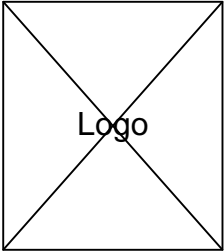
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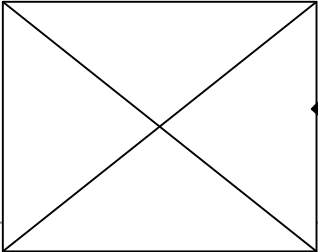
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## Super performance

To find out how your ACSRf investments have been performing, see below to view the current financial year and historical investment returns achieved by our Superannuation Plans.

Please note that past performance is not a reliable indicator of future performance. Returns may vary considerably over time. You should not make investment decisions based only on past performance.

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### Financial year-to-date returns

- Returns 2010/11
- [Past investment returns](#)

Investment options	Annual return (01 Jul 10 to 30 Jun 11)	Financial year to date (01 Jul 11 to 31 May 12)
Diversified Shares	9.1%	9%
Growth	9.1%	9.1%
Balanced	8.7%	8.9%
Socially Responsible Balanced	7.8%	5.8%
Conservative Balanced	8.0%	8.0%
Conservative	7.0%	7.0%
Australian Shares	14.0%	14.0%
International Shares	4.7%	4.7%
Diversified Property	15.7%	15.7%
Diversified Fixed Interest	5.6%	5.6%
Cash	4.8%	2.8%

### 2010/11 - Monthly returns

Investment options	Jul10	Aug10	Sep10	Oct10	Nov10	Dec10	Jan11	Feb11	Mar11	Apr11	May11	Jun11
Diversified Shares	9.1%	9.1%	9.1%	9.1%	9.1%	9.1%	9.1%	9.1%	9.1%	9.1%	9.1%	9.1%
Growth	9.1%	9.1%	9.1%	9.1%	9.1%	9.1%	9.1%	9.1%	9.1%	9.1%	9.1%	9.1%
Balanced	8.7%	8.7%	8.7%	8.7%	8.7%	8.7%	8.7%	8.7%	8.7%	8.7%	8.7%	8.7%
Socially Responsible Balanced	7.8%	7.8%	7.8%	7.8%	7.8%	7.8%	7.8%	7.8%	7.8%	7.8%	7.8%	7.8%
Conservative Balanced	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%
Conservative	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%
Australian Shares	14.0%	14.0%	14.0%	14.0%	14.0%	14.0%	14.0%	14.0%	14.0%	14.0%	14.0%	14.0%
International Shares	4.7%	4.7%	4.7%	4.7%	4.7%	4.7%	4.7%	4.7%	4.7%	4.7%	4.7%	4.7%
Diversified Property	15.7%	15.7%	15.7%	15.7%	15.7%	15.7%	15.7%	15.7%	15.7%	15.7%	15.7%	15.7%
Diversified Fixed Interest	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%
Cash	4.8%	4.8%	4.8%	4.8%	4.8%	4.8%	4.8%	4.8%	4.8%	4.8%	4.8%	4.8%

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- As the Conservative Balanced option was introduced from 7 July 2009, past performance prior to this date is not available
- These returns are net of tax and investment fees and were the effective return on opening account balances invested in the portfolio for the full period. Returns are calculated on a time weighted basis by using hard close unit prices (unit prices that incorporate updated valuations of Fund investments).
- Financial year-to-date returns represent the actual return achieved based on the number of days thus far into the financial year. It is not an annualised figure ie it does not represent 12 months of return.
- The Fund's Superannuation Plan has different tax treatment to the Allocated Pension Plan and as such, each Plan will experience different investment returns for the same portfolio options.

**Disclaimer:**  
Please note that these returns are only applicable for members who have not made any transactions (withdrawals, deposits or change of investment options) in the reporting period specified. Should there be any discrepancy between the website unit price figures and what is on ACSRf's administration system, then ACSRf administration system figures will prevail. Your investment return will be specific to the investment option chosen and influenced by the timing of your account balance movements in the investment option. You should be aware that the value of your investment may rise or fall. Past performance is not indicative of future performance.

Clicking on this tab - Past investment returns table will display.

The Past investment returns tab will only display the previous five financial years returns.

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<u>Returns</u> <u>2010/11</u>	Past investment returns						
Investment options	2010/ 11	2009/ 10	2008/ 09	2007/ 08	2006/ 07	5-year average	CPI 5-year average
Diversified Shares	9.1%	9.1%	9.1%	9.1%	9.1%	9.1%	9.1%
Growth	9.1%	9.1%	9.1%	9.1%	9.1%	9.1%	9.1%
Balanced	8.7%	8.7%	8.7%	8.7%	8.7%	8.7%	8.7%
Socially Responsible Balanced	7.8%	7.8%	7.8%	7.8%	7.8%	7.8%	7.8%
Conservative Balanced	8.0%	8.0%	8.0%	8.0%	8.0 %	8.0%	8.0%
Conservative	7.0%	7.0%	7.0%	7.0%	7.0 %	7.0%	7.0%
Australian Shares	14.0%	14.0%	14.0%	14.0%	14.0%	14.0%	14.0%
International Shares	4.7%	4.7%	4.7%	4.7%	4.7%	4.7%	4.7%
Diversified Property	15.7%	15.7%	15.7%	15.7%	15.7%	15.7%	15.7%
Diversified Fixed Interest	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%
Cash	4.8%	4.8%	4.8%	4.8%	4.8%	4.8%	4.8%

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Current unit prices

Past unit prices

2

Investment options	Buy price	Sell price
Diversified Shares	1.432588	1.425461
Growth	1.524954	1.516763
Balanced	1.519492	1.510730
Socially Responsible Balanced	1.494409	1.487863
Conservative Balanced	1.177221	1.172297
Conservative	1.557556	1.553207
Australian Shares	1.369302	1.364934
International Shares	0.938756	0.932045
Diversified Property	1.216536	1.191981
Diversified Fixed Interest	1.316835	1.316835
Cash	1.454573	1.454573

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Current unit prices

Past unit prices

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Search for unit prices in the last 12 months

All fields are required

Investment option:

All investment options

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4

From:

12/11/2011

5

To:

12/12/2011

6

Search

6

CONTINUE...

1 This page will maintain the same layout in Retirement – Pension performance

2 Past unit prices will be available for 52 weeks back from current date.

3 Clicking on the tab, past investment table will be displayed.

4 Dropdown menu values include: All investment options, Diversified Shares, Growth, Balanced, Socially Responsible Balanced, Conservative Balanced, Conservative, Australian Shares, International Shares, Diversified Property, Diversified Fixed Interest, Cash

5 Default past search date range is four weeks back from the current date.

6 Calendar will go max 12 months before

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Current unit prices

Past unit prices

Search for unit prices in the last 12 months

All fields are required

Investment option:

All investment options

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From:

07/05/2012

e.g. dd/mm/yyyy

To:

28/05/2012

e.g. dd/mm/yyyy

Search

Unit prices results for

All investment options from 07/05/2012 to 21/05/2012

Effective 21/05/2012

Investment options	Buy price	Sell price
Diversified Shares	1.432588	1.425461
Growth	1.524954	1.516763
Balanced	1.519492	1.510730
Socially Responsible Balanced	1.494409	1.487863
Conservative Balanced	1.177221	1.172297
Conservative	1.557556	1.553207
Australian Shares	1.369302	1.364934
International Shares	0.938756	0.932045
Diversified Property	1.216536	1.191981
Diversified Fixed Interest	1.316835	1.316835
Cash	1.454573	1.454573

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The link to pension unit prices will be shown in the 'Related links'

2

All investment options is the defaulted option. If no selection for investment options is made, unit price results for all available investment options will display for specified date range.

3

Default past search date range is four weeks back from the current date.

4

Results are displayed after user runs the search.

5

Results are ordered by 'most recent'

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Investment options	Buy price	Sell price
Diversified Shares	1.432588	1.425461
Growth	1.524954	1.516763
Balanced	1.519492	1.510730
Socially Responsible Balanced	1.494409	1.487863
Conservative Balanced	1.177221	1.172297
Conservative	1.557556	1.553207
Australian Shares	1.369302	1.364934
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Diversified Property	1.216536	1.191981
Diversified Fixed Interest	1.316835	1.316835
Cash	1.454573	1.454573

Effective 07/05/2012

Investment options	Buy price	Sell price
Diversified Shares	1.432588	1.425461
Growth	1.524954	1.516763
Balanced	1.519492	1.510730
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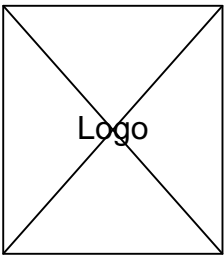
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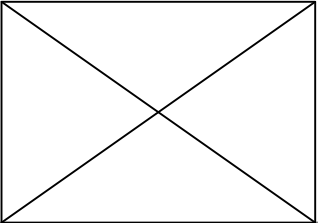
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## Super unit prices

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The calculation of ACSRF's unit prices includes a provision to be held to cover estimated amounts for future tax payable or future tax assets. The Trustee has established a policy in relation to the way in which these tax amounts will be estimated and included in unit prices. As part of the policy, the Trustee has also determined that it may be in some circumstances, to cap the maximum amount of any future tax asset to be included in unit prices. The aim of the policy is to assist in achieving equitable unit pricing outcomes for members.



[Current unit prices](#)

**Past unit prices**

Search for unit prices in the last 12 months *All fields are required*

Investment option:

Cashv

From:

07/05/2012

e.g. dd/mm/yyyy

To:

28/06/2012

e.g. dd/mm/yyyy

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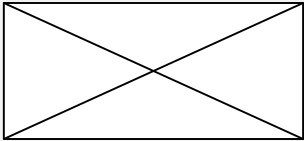
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Unit prices results for  
**Cash from 07/05/2012 to 28/05/2012**

#### Effective 21/05/2012

Investment options	Buy price	Sell price
Cash	1.454573	1.454573

#### Effective 14/05/2012

Investment options	Buy price	Sell price
Cash	1.454573	1.454573

#### Effective 07/05/2012

Investment options	Buy price	Sell price
Cash	1.454573	1.454573

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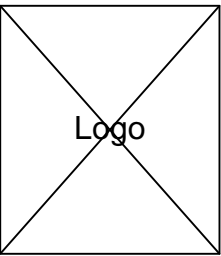
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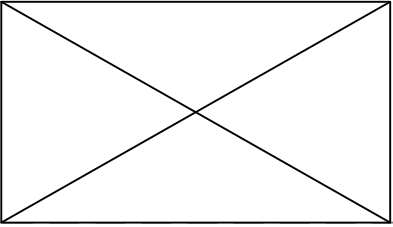
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ACSRF income protection insurance, called Temporary Salary Continuance or TSC, ensures that if you are temporarily unable to work through illness or injury you can still receive 85% of your salary, where 75/85ths of the benefit is paid to you and 10/85ths of the benefit is paid into your ACSR



superannuation account. ACSR offers income protection with 30, 60 and 90 day waiting periods and 2-year, 5-year and up to age 65 benefit periods

Should your illness or injury be of a permanent nature, your ACSR Total and Permanent Disablement (TPD) cover, will provide a lump sum payout to help you and your family plan for a future where normal workloads are probably not possible and adjustments need to be made. Death insurance is also a lump sum payout, which helps your family to better cope financially in your absence.

The premiums for this protection will be deducted tax-effectively direct from your super fund account.

*All insurance cover provided by the Fund to members is subject to the terms and conditions of ACSR's insurance policies.*

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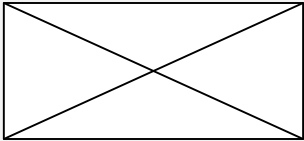
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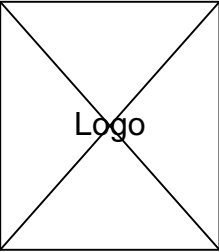
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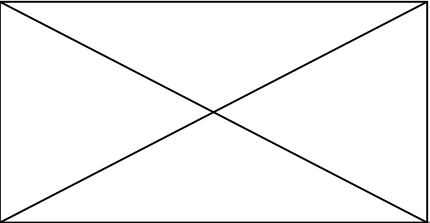
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## Insurance options

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The insurance options available to you with ACSRF will depend on your category of membership. Refer to your last benefit statement to determine your member category or contact your local Fund office.



- **Permanent members** with a sponsoring employer automatically receive 3 units of Death and TPD cover ACSRF also automatically provides units of TSC (each unit of TSC is equal to a salary of up to \$15,000.) to cover a salary (up to \$180,000 pa) on joining a sponsoring employer and choosing ACSRF.
- **Casual members** with a sponsoring employer will automatically receive 3 units of Death and TPD cover. Casual members will also receive 1 unit of TSC to cover a salary up to \$15,000 per annum. If your membership category changes from Permanent to Casual, you can now keep the same number of Death, TPD and TSC units you held as a Permanent member.
- If you finish work with a sponsoring employer, your membership category will be changed to Retained. You will keep the same number of Death and TPD units as you held in your previous category of membership. Your TSC units will continue for six months after the last employer contribution was received.
- If you leave a sponsoring employer to work for a non-sponsoring external employer, you will keep the same number of Death, TPD and TSC units that you held in your previous category of membership.
- **Personal members** must apply for insurance cover. You can apply for Death cover up to \$5 million, TPD cover up to \$2 million and TSC cover of up to \$25,000 per month.

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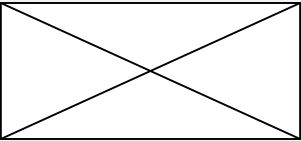
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- 3 Options are:  
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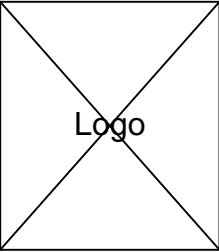
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A well-managed Allocated Pension Plan is important to help you enjoy your retirement lifestyle without the worries of ongoing management issues. View the features of ACSRF's pension offering.

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3 It will link user to the sub-landing page (2<sup>nd</sup> level of navigation)

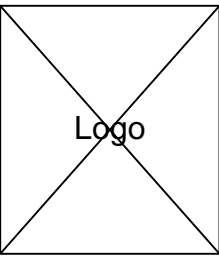
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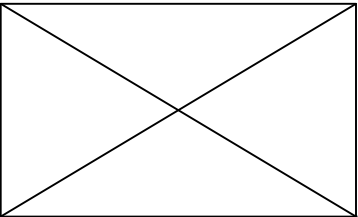
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## Are you looking to retire?

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When you stop working the bills don't stop. You will need an income stream, perhaps until you are eligible for an age pension or maybe to supplement the age pension.

An allocated pension is an income stream from a superannuation fund.



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You have your own individual account and you receive the investment earnings on your account. Allocated pensions are not guaranteed – how long your pension will last depends on investment returns and on how much pension you take.

There are two types of allocated pensions – one with no restrictions for those who are fully retired or have reached aged 65 and a non-commutable pension for everyone else. The only difference is that if you have a non-commutable pension, your annual pension payment is limited to 10% of your account balance and you are not permitted to take a lump sum from your account.

### Allocated pension rules v

- To start an allocated pension you must be at least 55 years old or permanently incapacitated.
- You can only use superannuation money to start an allocated pension. If you want to use non-super money, you must first contribute it to your super account.
- You can convert your pension back to super at any time.
- Once you start an allocated pension, you can't add to it. However you can convert your pension back to super, add any new money, then transfer the total to a new pension. Or you can set up a second pension.
- You must take at least a minimum pension every year - currently 3% of your account balance if you are under 65. The percentage you must take increases as you age.

### Transitioning to retirement v

There are two main ways you can use an allocated pension to transition to retirement:

- You can reduce your hours of work and take out an allocated pension to make up for the reduction in income.
- Alternatively you can continue to work full-time, take out an allocated pension and salary sacrifice some of your income from work back into your superannuation account. This strategy can save you tax, particularly if you are aged 60 or more.

This information does not take your financial circumstances into account. As these strategies are not suitable for everyone, we recommend that you seek advice from a reputable financial planner before making any decision.

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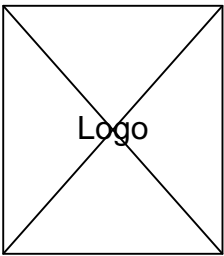
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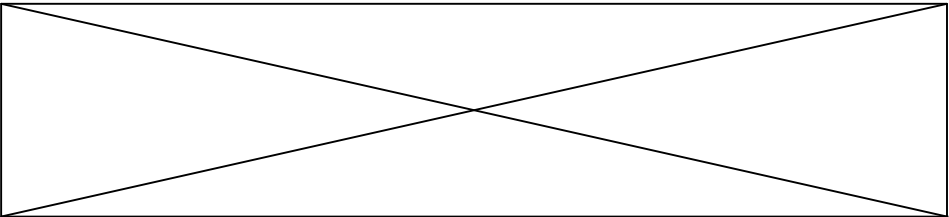
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## Our allocated pension offer

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ACSRF offers an allocated pension for those who are fully retired or have reached aged 65 and a non-commutable pension for everyone else.

- an industry fund, managed for the benefit of members
- a choice of [11 investment options](#) <sup>1</sup>
- [strong investment returns](#) <sup>2</sup>
- low fees and costs
- access to your account via [Members online](#)
- annual benefit statements and regular newsletters
- fee for service financial planning

### Fees & costs v

We charge you only what it costs to manage the Fund. We do not pay dividends to shareholders or commissions to advisers.

The following fees and costs will apply:

- a weekly administration fee of \$1.50
- operating costs of approximately 0.20% of your account balance per year
- estimated investment management costs ranging from 0.07% to 0.87% of your account balance (see the table below for details)
- a fee of \$35 for each lump sum withdrawal
- a Family Law withdrawal fee of \$70

#### *Estimated investment management costs*

These costs cover the fees charged to the Fund by investment managers, consultants and the custodian. They include an estimated amount for performance based fees that will only be paid if investment managers outperform their targets.

#### *Buy-sell spreads*

We normally apply a buy-sell spread to unit prices to cover the cost of buying and selling assets e.g. if you change your investment mix. When you start your allocated pension, we do not charge a buy-sell spread on any rollovers from your ACSRf super account.

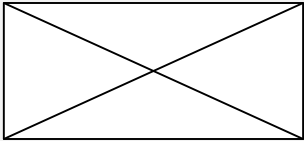
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<sup>1</sup> It links the user through the 'Investment choices' page

<sup>2</sup> It links the user through the 'Pension performance' page

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Investment options	Estimated investment management costs	Estimated buy - sell
Diversified Shares	0.73%	0.50%
Growth	0.79%	0.54%
Balanced	0.78%	0.58%
Socially Responsible Balanced	0.80%	0.44%
Conservative Balanced	0.66%	0.42%
Conservative	0.49%	0.28%
Australian Shares	0.61%	0.32%
International Shares	0.87%	0.72%
Diversified Property	0.75%	2.06%
Diversified Fixed Interest	0.36%	0.00%
Cash	0.07%	0.00%

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Most employees have the right to choose their own super fund. You should check with your employer organization if you don't know whether this applies to your employees.

You will need to select a fund for any employees who do not make a choice. The first step is to check the awards or employment agreements that apply to your employees, as these may stipulate one or more funds you must choose from. From the available funds, it is up to you to select a fund that meets your employees' superannuation needs. Obtaining the Product Disclosure Statements (PDSs) of the relevant funds is a useful starting point.

Why choose us? v

1

As the largest Catholic superannuation fund in Australia, ACSRF has a long history of meeting the superannuation needs of both Catholic and non-Catholic organizations.

We meet the needs of your employees in the following ways:

an industry fund, managed for the benefit of members

strong long-term investment returns

low fees and costs

flexible and affordable insurance

allocated pensions for retired members and those transitioning to retirement

member education through workplace visits, seminars, online calculators

fee for service financial planning

access to a range of benefits including Ask an Adviser, banking and general insurance products

rated a Platinum (top level available) fund by SuperRatings.

ACSRF is named in the (non-tertiary) education industry modern awards and so is eligible to be selected as a default fund by education industry employers. If you are not in the education industry, but are already making contributions to ACSRF for some employees, you may also be able to nominate us as your default fund – you should check with your employer organization or industrial relations adviser.

How your employees can choose their fund v

New employees

If your employees are eligible for choice of fund, you must provide new employees with a Standard Choice Form (available from the ATO website). You should include the details of your default fund on this form.

You can help your employees to make an informed choice by providing them with a PDS from your default fund. Or else refer them to the PDS on your default fund's website. However you should not make a recommendation to staff that they join your default fund, as you are not permitted to give financial advice without a licence.

If employees make a choice, future payments will be made to their chosen fund. If they do not make a choice within 28 days, then their contributions must be paid to your default fund.

Existing employees

Employees may revisit their fund choice every 12 months. If an employee requests a change of fund, you should provide them with a Standard Choice Form

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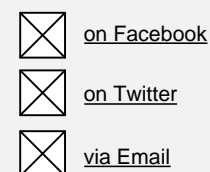
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ACSRF will happily organise a visit to your workplace and tailor an information session specifically for your needs. We are committed to helping current and prospective investors to increase knowledge and an understanding of super and retirement money matters so that you can take control of your financial future.

Fill out the form below to book your ACSRf visit now.

Organisation details

\* Required fields

Organisation / School name\*:

Address\*:

Suburb\*:

State\*: Please select v 1

Postcode\*:

Contact information

First name\*:

Last name\*:

Phone number\*:

E.g. 02 1234 5678 or 0415 123 456. Australian numbers only.

Mobile number:

E.g. 0415 123 456. Australian mobile numbers only.

Email address\*:

Confirm email address\*:

Preferences & attendees

Preferred day: dd/mm/yyyy

Preferred time: Anytime v 2

Approx no of attendees:

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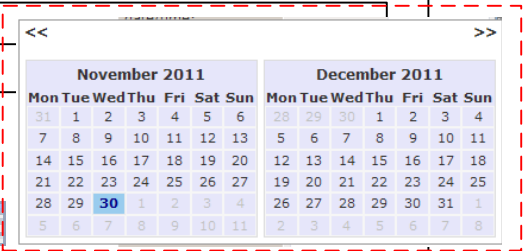
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QLD  
WA  
VIC  
SA  
NT  
TAS
- 2
- Dropdown values are:  
-Anytime  
-Morning  
-Afternoon
- 3
- Dropdown values are:  
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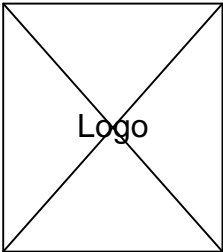
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If we are not your default fund, you can pay contributions for existing ACSRF members without joining as an employer. All you need to do is provide us with your details, using the Employer details form.

Enrolling new employees >

New employees may already be members of ACSRF. In that case, you should not re-enrol them. Instead ask for their Client ID number and include it on your contribution return. Employees who are not already members can be enrolled on the contribution return.

Making contributions >

The simplest method for large employers to send contribution data is by payroll file. Payment can be made by EFT or BPay. Contact ACSRF Administration on 1300 658 776 for our file format requirements and our bank account details.

Alternatively you can download our contribution remittance advice. Mail or email your completed advice and make payment by EFT, BPay or cheque. Contact our Administration team for details of how to pay by EFT or BPay.

Making payments to a number of funds >

ACSRF clearing house facility

ACSRF provides a clearing house facility to eligible employers. You make a single payment and the clearing house distributes the money to the different funds in accordance with your instructions.

This service is free of charge to eligible employers who have selected ACSRF as their default fund. To take advantage of this service, phone our Business Development Manager (NSW) or your local Regional Manager on 1300 658 776.

Medicare clearing house

Medicare provides a free clearing house for employers with less than 20 employees. For details, go to [www.medicare.gov.au/super](#).

Updating employee information >

Help us to ensure the information we hold about our members is accurate by providing updated information on your contribution return. Or you can email the details to [fundoffice@catholicsuper.com.au](#)

Terminating employees >

If an employee has left their employment, please include this information on your next contribution return and include the date of termination.

Helping employees who become disabled >

Employees who become disabled may be eligible to claim on their ACSRF insurance. You can help by reminding them of this and suggesting they contact the fund.

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4 If the the suggestion consists in an event, the call to action will be 'Read more'

5 User will be displayed video content and they can be presented up to 3 videos options.

6 The latest newsletter for the particular user segment will be displayed (e.g. Super members will see Super newsletters. Transitioning members will be displayed the latest 2 newsletters as follows:  
1 x superannuation  
1 x pension

7 Pension member's newsletters

8 All newsletters will link the user through 'Our newsletters' in Tools & Resources. Only logged in members can have access to that page.

9 It will link the user trough the Ask an adviser website (external link)  
  
http://askanadviser.com.au/iffp/

10 My Account pages are not available until Single Sign On becomes available in a future phase.

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4If the the suggestion (consists in an event, the call to action) will be 'Read more'

5User will be displayed video content and they can be presented up to 3 videos options.

6Retirement newsletter

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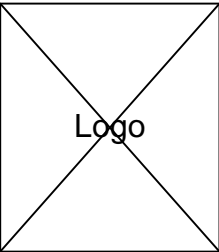
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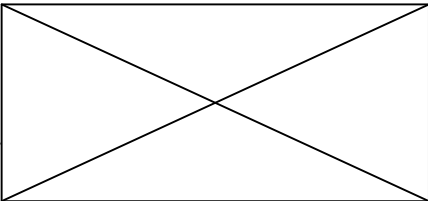
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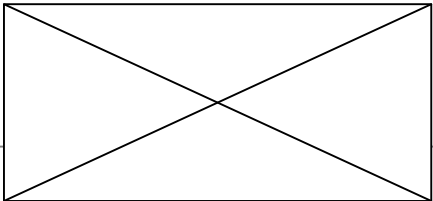


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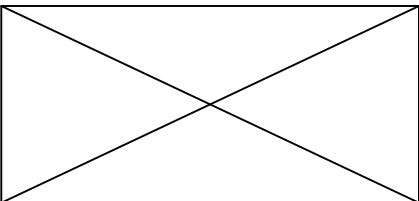
### Seminars & events



ACSRf invites you to attend one of our free general information sessions. Your family and friends are also welcome to come along, so don't forget to make a booking for them too.

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Are you contributing enough to super? What difference would extra contributions make to your benefit or retirement? Try out our range of calculators that will help you to answer these questions and more.

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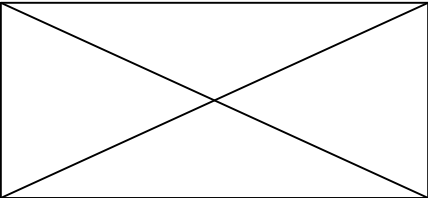
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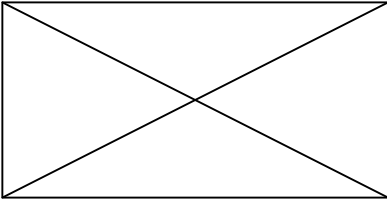
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Watch videos on helpful topics on superannuation and retirement, as well as the benefits of joining us.

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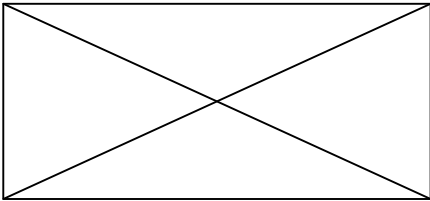


People often ask us the same kinds of questions. You may find our general information pages and Frequently Asked Questions to be helpful.

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Our latest news section helps you gain a broader understanding of your superannuation money matters and make better informed decisions.

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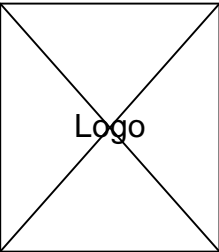
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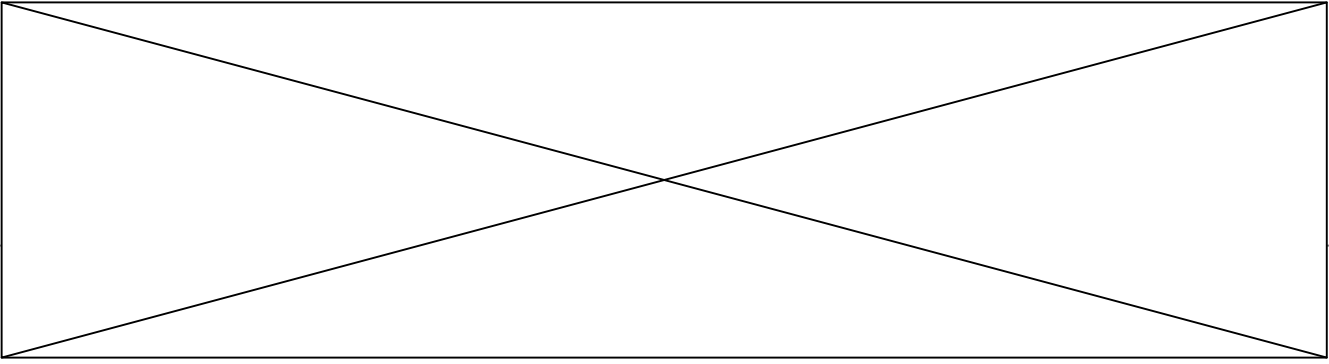
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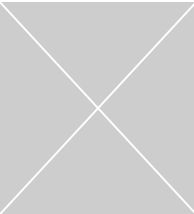
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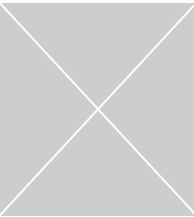
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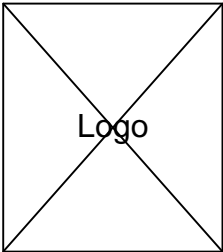
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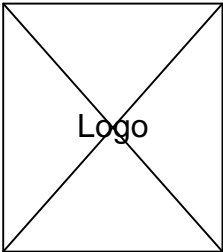
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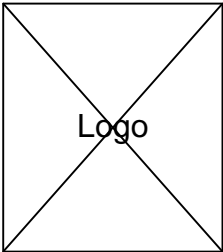
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NSW

When: Monday, 13 January 2012   4.30pm – 6:00pm

This seminar has been especially developed for members who are one to three years away from retirement. It provides a comprehensive approach on how to determine what your targeted superannuation savings needs to be (in today's dollars) to support a certain level of continuing allocated pension income in retirement, and whether your current balance and contributions are on track to meet this target.

Where: Saint Anthony College, 450 George Street, Sydney

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Last name\*:

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Location map & contact info

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Retirement planning and allocated pension

Mon 13 Feb 2012

4:30pm-6:00pm

Location

Meeting room, Mary Immaculate Church

31 Edmund Rice Drive

Ashmore, QLD

Contact info

Mr John Jokantas

Australian Catholic Super

Regional Manager

Port Macquarie, NSW

T: 02 6583 8100

E: [John.Jokantas.acsrf.com.au](mailto:John.Jokantas.acsrf.com.au)

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4:30pm-6:00pm

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Regional Manager  
Australian Catholic Super

Mr John Coleman2

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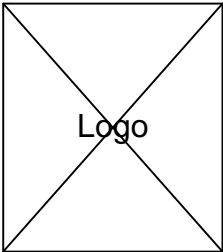
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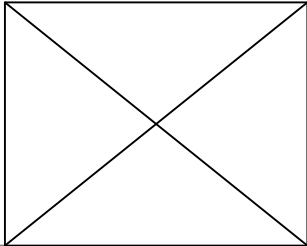
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The process begins with a no-cost meeting that includes a detailed investigation of your personal and financial circumstances and your attitude toward investing. You will also receive a Financial Services Guide providing you with basic information about the Financial planning services .

Following this detailed analysis, your financial planner will identify your goals and what you want from the financial plan. They will inform you of the cost of preparing and presenting a financial plan, should you wish to proceed. If you do not wish to proceed, there is no cost.

If you do decide to go ahead, your planner will produce a written Statement of Advice (SOA) detailing the strategies that will address your financial goals, based on the information you provided.

Once the SOA has been developed, a further meeting will take place to discuss the recommendations and to make any appropriate alterations. Your approval will be sought before any recommendations are implemented.

At a later time, you may decide to meet with your planner again to review your plan and ensure that you are on track to meet your financial goals. All reviews and follow up work are charged on a ‘fee for service’ basis.

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You can pay for your financial planning advice by cheque, credit card or deduction from your ACSRf super or allocated pension account.

While you may need advice on a number of issues, only the cost of the financial advice that relates to your ACSRf membership and related products is eligible to be deducted from your account. For example, areas of advice for which the cost may be deducted may include:

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- transition to retirement and retirement planning using ACSRf products
- estate planning where there is an impact on your ACSRf account
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The Fund simply wants to ensure that you avoid paying more tax on your super than is absolutely necessary.

The following taxation rules will apply if you do not have a TFN recorded with your superannuation fund:

- Super funds will only be able to accept your non-concessional contributions (ie lump sum (post-tax) contributions) if you have quoted your TFN.
- If you were an existing fund member as at 1 July 2007 and have not quoted your TFN, your concessional contributions (ie employer (Superannuation Guarantee), salary sacrifice and self-employed contributions) in excess of \$1,000 for the financial year will be subject to penalty taxes. The \$1,000 limit does not apply if you joined the fund after 30 June 2007 and accordingly, all of your concessional contributions will be taxed at 46.5% instead of the normal 15% and the super fund must remit the taxes to the Australian Taxation Office (ATO).

It is not compulsory to provide your TFN, however, to avoid the rejection of post-tax contributions or additional taxes being imposed on other contributions, please complete an ACSRf Tax file number nomination form and return it to us as soon as possible. You will then be able to continue to contribute on both a pre-tax or post-tax basis without penalty, provided you are eligible.

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1Questions for each category will be listed below the heading and will behave as compactor.

2Answer to the FAQ will expand in page if user clicks on the FAQ

3More than one compactor can be opened at a time.

4Example content for Superannuation, Retirement and Employers' FAQs tabs.

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Fold (1024x768)

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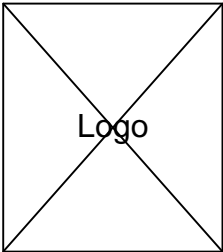
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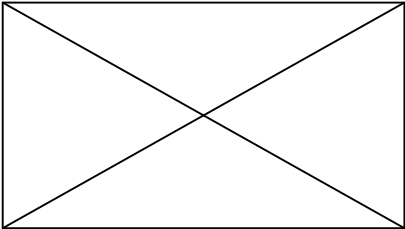
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## Join as a super member

### Get started now and enjoy our membership benefits

It will take only 5-10 minutes to complete our secure online application form and tailor your investment or insurance options based on your needs.



[Email](#) [Print](#)

If you need to stop at any time, you can save the application and come back at a later stage.

Joining online is secure. All you need is:

- Your personal details and contact information.
- Your employer’s details or your ABN if you are self-employed.

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 or 

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4. Insurance & rollover

5. Beneficiaries

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Personal details

\* Required fields

Title\*:

Please selectv

First name\*:

Last name\*:

Gender\*:

☐ Male ☐ Female

Date of birth\*:

DayvMonthvYearv

Postal address\*:

Suburb\*:

State\*:

Please selectv

Postcode\*:

☐ My residential address is different from my postal address

Residential address\*:

Suburb\*:

State\*:

Please selectv

Postcode\*:

Contact information

Phone number\*:

E.g. 02 1234 5678 or 0415 123 456. Australian numbers only.

Mobile number:

E.g. 0415 123 456. Australian mobile numbers only.

Work phone number:

E.g. 02 1234 5678 or 0415 123 456. Australian numbers only.

Email address\*:

Confirm email address\*:

☐ "I confirm that I have read and [understood the Australian Catholic Superannuation Superannuation Plan Product Disclosure Statement \(PDF xxKB\)](#)".

2

Save for later? ☒ or [Cancel and go to Home](#)

Next

Footer

1

To be CMS driven as per client requirement

2

Save option will be effective if the user enters at least First name, Last name and email address or an error message will be displayed

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Fold (1024x768)

1

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Employment details

\* Required fields

My super contributions will be paid by:\*

Myself

My employer

My spouse

Payment type\*:

Please selectv

Company details

Trading name of company\*:

ABN:

Postal address\*:

Suburb\*:

State\*:

v

Postcode\*:

Phone number\*:

E.g. 02 1234 5678 or 0415 123 456.  
Australian numbers only.

Email address\*:

Confirm email address\*:

Company contact first name\*:

Company contact last name\*:

Contact position\*:

Back

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Save for later?

☒

or Cancel and go to Home

Footer

Users can go back to a previous step clicking on tab. Data will be retained in the system when they go back to the last tab filled in

'Payment type' dropdown menu will be disabled until user selects one of the radio buttons

If user selects 'myself', payment type options are:  
- Cheque  
- EFT (Electronic funds transfer)  
- Direct Debit  
- BPAY

If user selects 'My employer', payment type options are:  
- Cheque  
- EFT (Electronic funds transfer)  
- BPAY

If user selects either 'My spouse', payment type options are:  
- Cheque  
- EFT (Electronic funds transfer)  
- BPAY

Company details fields will be displayed if user selects 'My employer' radio button'

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Employment details

\* Required fields

☒ Myself

☐ My employer

☐ My spouse

Payment type\*:

Direct debit

v

1

In order to set Direct debit as payment type please download, fill in and post the [Direct Debit request form \(PDF 230KB\)](#) to ACSRf.

☐ I don't have a printer. Please send me the [Direct Debit request form](#) via mail

3

2

2

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1 If user selects 'Direct debit' as payment type, additional text will be shown.

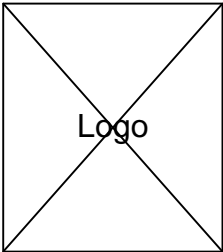
3 Checkbox is unselected by default

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Your investments choices

\* Required fields

1

1

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requirement

Fold (800x600)

You can invest in 1 or a combination of up to 11 investment options. Please refer to our [Super investment options fact sheet](#) (PDF 1.07MB) for further information.

Please enter the percentage you wish to invest for each investment option for a total of 100% (use whole numbers).\*

Fold (1024x768)

Diversified Shares  %

Growth  %

Balanced  %

Socially Responsible Balanced  %

Conservative Balanced  %

Conservative  %

Australian Shares  %

International Shares  %

Diversified Property  %

Diversified Fixed Interest  %

Cash  %

2

TOTAL  % *Total has to equal 100%*

Tax file number

Tax file number (TFN) is not a mandatory field. Please note that if you do not provide your TFN to the Fund, [Australian Catholic Superannuation](#) will not be able to accept my non-concessional (post-tax) contributions and that additional tax may be payable on your other contributions and benefit payments.

For more info, please read our [Tax and super fact sheet](#) (PDF 130KB).

TFN:

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2

If total % is more  
or less than 100,  
the field will  
change colour



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Insurance options

\* Required fields

As a personal member of [Australian Catholic Superannuation](#), you will not automatically receive insurance cover.

If you would like insurance cover, please read our [Insurance options fact sheet](#) (PDF 180KB).

☐ Please contact me with more information on the insurance options [available](#).

Rollover to [Australian Catholic Superannuation](#)


Would you like to consolidate your other super accounts into your [Australian Catholic Superannuation account](#)? \*

- ☐ Yes, I will download the [Consolidate your super form](#) (PDF 415KB)
- ☐ Yes, please send me the 'Consolidate your super' form via mail
- ☐ No, thanks

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5. **Beneficiaries**

6. Confirm & submit

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Beneficiaries details

\* Required fields

Would you like to nominate any preferred beneficiaries?\*

☐ Yes, I would like to nominate beneficiaries

☐ No, thanks

1

Please list below the people you would like your benefits to be paid to.

First name:\*

Last name:\*

Gender:\*

☐ M   ☐ F

Nature of relationship:\*

% of benefit:\*

Total cannot exceed 100%

Date of birth:\*

Day

v

Month

v

Year

v

Address:\*

Suburb:\*

State:\*

v

Postcode:\*

[Add additional beneficiary](#)

2

3

Any preference expressed here is not binding on the Trustee, but it will be taken into consideration by the Trustee when deciding to whom to pay a benefit on your death. Your death benefit may be paid to your dependants and/or your legal personal representative ie your estate. The term dependant means spouse (including *de facto* or same sex spouse), child (including as defined in family law), a person in an interdependency relationship, or any person who is financially dependent on you. If you have no dependants and no legal personal representative, you may nominate one or more other persons. Should your circumstances change (e.g. you marry or divorce, or on the birth of a child) and you wish to alter your nomination, you should complete a new [Change of personal details form \(PDF 700KB\)](#). The Trustee does also offer binding nominations. download a copy of our [Binding death benefit nomination form \(PDF 890KB\)](#).

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1 This fields will be displayed if user selects 'Yes, I would like to nominate beneficiaries'

2 Clicking on this link, the beneficiaries' fields will duplicate. [Unlimited number of beneficiaries.](#)

3 To be CMS driven as per client requirement

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Confirmation of information

\* Required fields

Personal details

Full name: Miss Sarah Coleman

Date of birth: 03/09/1974

Post address: 484 Military Road, Cremorne NSW 2080

Residential address: 484 Military Road, Cremorne NSW 2080

Phone number: 02 1234 7890

Mobile number: 0415 879 512

Work number: 02 4321 0987

Email address: sara.coleman@me.com.au

Change personal details

1

Investment choices

I would like my future contributions to be invested in:

Diversified Shares

40

%

Balanced

20

%

Conservative

10

%

Australian Shares(UT)

30

%

Total

100

%

Tax File Number: RTADT87

2

Change investment choices

3

Submit your application online

☐ I would like to be contacted by a financial planner (first consultation is free).

☐ I would like to get more information on the new ISinsured (Industry Super Insurance) range of general insurance products, issued by CUNA Mutual General Insurance.

☐ I confirm that I have read and [understood](#) the [Australian Catholic Superannuation Superannuation Plan Product Disclosure Statement \(PDF xxKB\)](#).\*

The information you provide will be treated in accordance with our [Privacy Policy](#).

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Submit

Save for later? ☒ or [Cancel and go to Home](#)

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Clicking on this button, user will be linked back to Step 1. All the data entered will be retained in the system. All the step's tab will be linkable in order to allow the user to go back to the last step only in one click.

TFN will be displayed only if user entered in step 3.

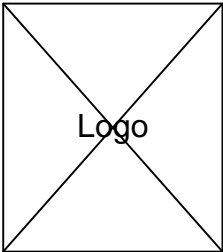
Clicking on this button, user will be linked back to Step 3. All the data entered will be retained in the system. All step tabs will be linkable in order to allow the user to go back to the last step only in one click.

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Thank you. Your application has been submitted successfully.

Your application reference number is: **AERT4510**

1

We have also sent you an email to [*email entered in Step 1*] for your records.

One of our consultants will contact you within 2 working days to complete the registration process.

If you have any queries, please contact us on 1300 658 776.

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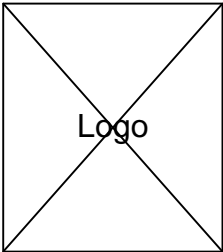
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The application reference number for submitted applications will be stored in the system so that Call centre operators can have access to the application if the members contact them.



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Your application has been saved successfully.

You can access your application at any time using the following reference ID:

Application reference number is: **RQTF7963**

The application will be retained in our system for 2 months before being deleted.

We have also sent you an email to [*email entered in Step 1*] for your records.

If you wish to complete your application, please go to [Continue a saved application](#) and enter the Application ID you have been assigned.

If you have any queries, please contact us on 1300 658 776.

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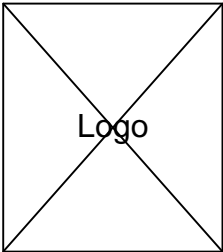
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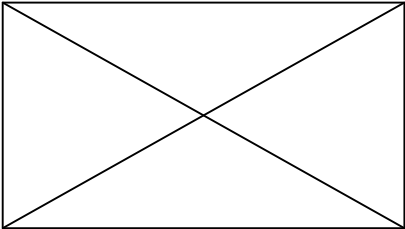
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## Join as a pension member

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### Get started now and enjoy our membership benefits

[Australian Catholic Superannuation](#) offers an allocated pension for members who have retired and a non-commutable allocated pension for those transitioning to retirement.



Details of these two products are contained in our Product Disclosure Statement (PDS), which you should read before making your decision.

The PDS explains how allocated pensions work and outlines your investment and pension payment options.

#### Joining an [Australian Catholic Superannuation](#) retirement plan is easy!

If you are looking to become a member, please provide your contact details. One of our [Customer Service Officers](#) will call you back shortly.

#### Need more help?

- ☐ [Contact us](#)
- ☐ [Let us call you back](#)

#### Related links

- ☐ [Pension PDS \(PDF 280KB\)](#)
- ☐ [Our pension offer](#)
- ☐ [Pension performance](#)

#### Did you know that...?

With an ACSRF allocated pension, you can reduce your hours of work without reducing your income.

Title\*: 

Please select v

*\* Required fields*

First name\*:

Last name\*:

State\*: 

Please select v

Phone number\*:   
*E.g. 02 1234 5678 or 0415 123 467. Australian numbers only.*

Email address:

Confirm email address:

Preferred time: 

Anytime v

2

Please call me back

The information you provide will be treated in accordance with our [Privacy Policy](#).

Alternatively, call us on 1300 658 776 or download our membership application form and post it completed, signed and dated to PO Box 656, Burwood NSW 1805.

#### Download

- ☐ [Allocated pension product disclosure statement \(PDF 670KB\)](#)
- ☐ [Membership application: Allocated Pension Plan \(PDF 670KB\)](#)

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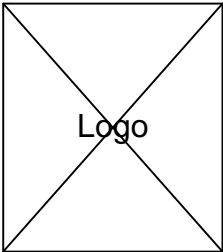
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☐

Call us on 1300 658 776

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Thank you [Full name entered].

Your application reference number is: **AERT4510**

One of our consultants will contact you within 2 working days to complete the registration process.

If you have any queries, please contact us on 1300 658 776.

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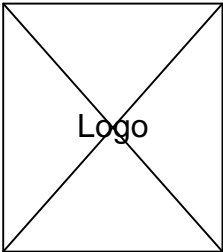
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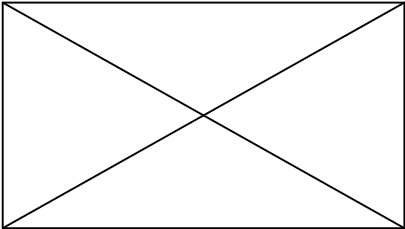
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### Get started now and enjoy our membership benefits

It will take only 3-5 minutes to complete our online application form and tailor your investment or insurance options based on your needs.



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If you need to stop at any time, you can save the application and come back at a later stage.

Joining online is secure. All you need is:

- Your company details
- Your ABN

Join now

 or 

Continue a saved application

If you want to enrol new members into the Fund or to nominate [Australian Catholic Superannuation](#) as your default fund, please contact our business development team on 1300658 776 for assistance.

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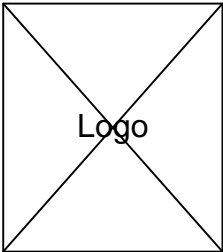
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1. **Company details**
2. Confirm & submit

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Company information

\* Required fields

Trading name of company\*:

ABN:

Company address\*:

Suburb\*:

State\*:

v

Postcode\*:

Company contact

Title\*:

Please selectv

First name\*:

Last name\*:

Contact position\*:

Phone number\*:

E.g. 02 1234 5678 or 0415 123 456. Australian numbers only.

Mobile number:

E.g. 0415 123 456. Australian numbers only.

Email address\*:

Confirm email address\*:

Payment details

Payment type: 

Please selectv

1

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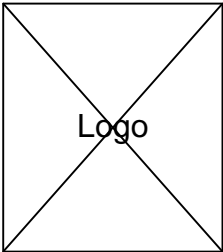
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'Payment type' options are:

- BPay
- EFT (Electronic funds transfer)
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\* Required fields

Trading name of company: ACTD Pty Ltd

ABN: 00 123 456 789

Company address: 484 Military Road, Cremorne NSW 2080

Company contact: Miss Sarah Coleman

Phone number: 02 1234 7890

Mobile number: 0415 879 512

Email address: sara.coleman@me.com.au

Payment type: BPay

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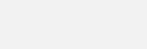



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Message the user  
will be displayed if  
they click on  
'Save for later'

1

Subject: Australian Catholic Super - Join as a super member2

Dear [name entered in the online form],2

You have successfully submitted your 'Join as super member' application form.

Your application reference number is: **AERT4510**

One of our consultants will contact you within 2 working days to complete the joining process.

If you have any queries, please contact us on 1300 658 776.

Kind regards,

Australian Catholic Super Retirement Fund

1

An email will be sent to the user both if they save or submit the join online application.

2

'employer member' is the alternative scenario

Subject: Australian Catholic Super - Join as a super member[saved for later]

Dear [First name entered in the online form],

You have requested to save the online application for 'Join as super member'.

Your application reference number is: **AERT4511**

To continue your online application, please click on the link below and enter your email address and application reference number:  
[www.continue\\_saved\\_application.com.au](http://www.continue_saved_application.com.au)

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Kind regards,

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2. Confirm & submit

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\* Required fields

Confirmation of details

Trading name or company name:  
ABN:  
Company address:  
  
Company contact:  
Phone number:  
Mobile number:  
Email address:  
  
Payment type:  
  

Change company details

If you leave this process, your data will not be saved.

Are you sure you want to leave this page?

Yes, leave this page

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No, return to the application

Submit you application online

☐ I would like to be contacted by a financial planner (first consultation is free).

☐ I would like to get more information on the new ISinsured (Industry Super Insurance) range of general insurance products, issued by CUNA Mutual General Insurance.

☐ I confirm that I have read and accept the [ACSRF Financial Services Guide – 01 Jul 2011 \(PDF 350KB\)](#) \*

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Join as a pension member

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### Continue a saved application

In order to complete a pre-saved join online application, please enter your email address and the application reference number you were emailed.

1

Please review the following field(s) before proceeding.

Application reference number:

This is a required field 2

Email address:

This field entry is not valid 3

Continue your application 4

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2 This message will display on the highlighted field when a user has left a required field blank.

3 This message will display on the highlighted field when a user has made an invalid entry.

4 It will link to the last step of the form where user left fields incomplete.

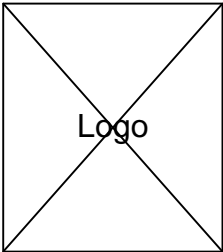
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
**Did you know that...?**  
We are the largest Catholic industry super fund in Australia and we are open to anyone eligible for superannuation.

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## ACSRF in NSW

**Address** 33 Burwood Road, Burwood NSW 2134 (Head office)

**Phone** 1300 658 776 

**Fax** (02) 9715 0090

**Open** Monday to Friday, 8:30 am - 5:30 pm  
(National public holidays excluded)

Select your state

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\* *Required fields*

Our Customer Services team will respond within three working days.

What is your enquiry about?\*

Please select

V

Your name\*:

Contact number:

Email address\*:

Confirm email address\*:

Your enquiry\*:

(Max 1000 characters)

[illegible]

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4 | User can alternatively select a state from the dropdown menu. Available states are:

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- NSW
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1

Select your state 

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2

There is currently no branch located in your selected state. Please contact the NSW head office for enquiries.

ACSRF in NSW

Address

33 Burwood Road, Burwood NSW 2134 (Head office)

Phone

1300 658 776

Fax

(02) 9715 0090

Open

Monday to Friday, 8:30 am - 5:30 pm  
(National public holidays excluded)

3

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3

User can alternatively select a state from the dropdown menu. Available states are:  
- ACT  
- NSW  
- TAS  
- QLD  
- SA  
- WA  
- VIC  
- NT

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\* Required fields

Our [Customer](#) Services team will respond within [three](#) working days.

What is your enquiry about?\*

Please select 

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Your name\*:

Contact number:

Email address\*:

Confirm email address\*:

Your enquiry\*:  
(Max 1000 characters)

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1 Map is selectable. Once state/territory is selected, branch's details will show up on the right

2 Where state selected on map or dropdown menu does not have a branch, the user will be notified that a branch in that state does not exist and should direct queries to the NSW head office.

3 User can alternatively select a state from the dropdown menu. Available states are:  
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## Email us

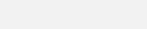
\* *Required fields*

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
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
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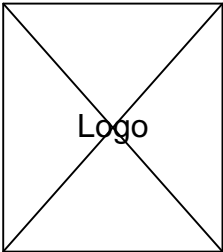
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Investor Daily | Super funds not walking the SRI talkk

9 May 2012

Super funds recognise the importance of sustainability, but do little to achieve it, according to SuperRatings. The researcher recognised the Australian Catholic Superannuation and Retirement Fund as a sustainable fund under its Infinity System.

http://service.meltwaternews.com/mnews/redirect.html?docId=2138242187&userId=2363195&agentId=2251368&type=1&s=4...

Stronger Super challenge looms for superannuation industry as the Government ...

2 May 2012

The Government's Stronger Super regime remains the greatest challenge confronting the superannuation industry in 2012 – and a roundtable conducted during CMSF reveals the devil is in the detail.

http://www.catholicsuper.com.au/latest-news/stronger-super-challenge-looms-for-superannuation-industry-as-the-government...

Women and super: Shifting the balance

29 Apr 2012

There are a number of key factors influencing gender inequality in terms of super accumulation. Savings are essential for maintaining and hopefully even improving our lifestyle, especially when we reach retirement. They should be the reward for a lifetime of hard work and should bring enjoyment and choices.

http://www.catholicsuper.com.au/latest-news/women-and-super-shifting-the-balance

Financial Standard online | Government overhauls aged care

17 Apr 2012

The introduction of means testing for aged care by the Federal Government is set to reshape the entire industry, with flow-on effects expected for advice.

http://www.financialstandard.com.au/news/view/12843964/

A sound investment for your journey into retirement

8 Mar 2012

Embrace your planning at least five years out from your desired retirement date is a sound way to ensure that you are as prepared as possible for your retirement.

http://www.catholicsuper.com.au/latest-news/a-stronger-sound-investment-for-your-journey-into-retirement

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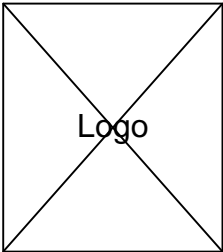
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18 May 2012

These days we're generally living longer and increasingly looking toward spending more time in retirement. Ultimately, this means having to make savings stretch further and last longer.

Avoiding some common pitfalls of retirement planning

Even with the best laid plans to ensure that your retirement savings will adequately support and hopefully outlast you, it can take some getting used to the often significant changes in your finances when you eventually cease working for a living.

Because there are such life changing times ahead and many factors to consider when putting plans in place for your ideal retirement lifestyle, it can be easy to miss some of the key financial signposts along the way. So, here are some of the common retirement pitfalls of which to be aware and suggestions on how you can avoid them.

1. The 'She'll be right!' approach
2. Not understanding your budget and needs
3. Missing out on benefits provided through superannuation
4. Underestimating how long you will live
5. Neglecting your health
6. Assuming you will always be able to work
7. Not understanding your investments
8. Dealing with life after the 'honeymoon' period ends

While it's great to have your future financial situation all sorted out or as clearly arranged as you can, there's also another very important aspect of retirement that many people neglect to bear in mind and that's the change in their lifestyle. It's important that you consider your quality of life and the potential physical, mental, emotional and social effects that retirement may have on you. Think about the ways that you will get along with your partner, especially if you are both retired and not get on each other's nerves and manage your shared and differing interests.

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