

Notes for previous superannuation provider

Name of Fund: Mercer Super Trust **SFN:** 3297 429 55 **ABN:** 19 905 422 981

When transferring money in to Anglican Super a plan in the Mercer Super Trust please note:

- Mercer Super Trust is a regulated super fund under the Superannuation Industry (Supervision) Act 1993. Accordingly the Mercer Super Trust can accept the rollover of both preserved and non-preserved benefits in accordance with the Superannuation Industry (Supervision) Act.
- Cheques should be made payable to **Mercer Super Trust – Anglican Super – Account of [member's name]**
- Please forward:
 - this authority
 - the cheque
 - a Rollover Benefit Statement
 - other associated documentation

Mercer Super Trust
GPO Box 4303
Melbourne VIC 3001

Signature and Declaration

Don't forget to sign and return this form to Mercer Super Trust.
You should also keep a copy for your records.

By signing this form, I:

- acknowledge that I have received all information I require in order to exercise the choices I have made.
- declare that I am eligible to become a Category Family member or Retained Benefits Family member of Anglican Super.
- agree to notify the trustee in writing if I cease to be in a Family Relationship with my Member Relation (as defined in the PDS).
- declare that the person who completed and signed the 'Existing Anglican Super Member related to applicant' section of this Application and Rollover Form is related to me (as defined in the PDS) and already a member of Anglican Super.
- accept that I will be bound by the provisions of the trust deed, designated rules and benefit design schedule which govern the operation of my plan and the Mercer Super Trust.
- agree to be automatically transferred to the Retained Benefits Family category of the Plan in the Mercer Super Trust if my Member Relation leaves their Employer or where my Member Relation has directed their Employer to pay Superannuation Guarantee contributions on their behalf to another fund or I cease to be in a Family Relationship with my Member Relation (as defined in the PDS) (as applicable) (if my super account balance is at least \$1,000).
- understand and consent to my information being collected, disclosed and used in the manner set out in the *Other Things You Should Know* booklet.
- acknowledge that if I provided my email address and/or mobile phone number in this *Application and Rollover Form*, the trustee may, at its discretion, use that email address or mobile phone number (as amended and notified to the trustee from time to time):
 - to send me information concerning my super, including any annual reports, member and exit statements, notices of material changes or occurrence of significant events and other member communications or publications; and
 - for marketing and research purposes, including sending me information about other financial products or services offered by the trustee or any of its related parties (unless I have requested you not to do so by contacting the Helpline).
- acknowledge that the trustee may provide any member communications (including any annual reports, member and exit statements, notices of material changes or occurrence of significant events and other member publications) and/or marketing and research material that are permitted by law to me by:
 - sending it to me by email (which may include a link to a website from where it can be downloaded) where I have provided my email address including any email address provided by any other person on my behalf including my Employer; and /or
 - SMS (where we have a mobile phone number provided by you); and/or
 - making it available to me on a website from where it can be downloaded.
- acknowledge that where the trustee is unable to accept certain contributions made by me, or on my behalf, then those contributions will be returned by the trustee to me or the person or organisation (including my Employer) who made the contribution on my behalf and any such contribution will not be added to my super account balance.
- acknowledge that I have read and understood the PDS and agree to be bound by it. I understand that the PDS contains a number of references to important information set out in a number of booklets (each of which form part of the PDS) and they should be read before I make a decision about Anglican Super in the Mercer Super Trust.
- understand that all of my super in the Plan will be invested in the Mercer SmartPath investment option until the time I make an alternative investment choice and that choice is processed by the trustee.

Signature

X

Date

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