

# Application Form to join Anglican Super and Rollover Form - Category Family Members and Retained Benefits Family Members

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



This Application and Rollover Form is for applying for participation in Anglican Super (your Plan), a plan in the Corporate Superannuation Division in the Mercer Super Trust under the Product Disclosure Statement (PDS) dated 1 June 2022. **Existing Category Family members and Retained Benefits Family Members who wish to alter any contact details, change investment options or apply or change any insurance cover should call the Helpline on 1800 682 525.** 

#### About this form

We need you to fill out this form to let us know:

- your details
- your investment option(s) for your super
- if you'd like to apply for Death and Total and Permanent Disablement (TPD) cover
- who you'd prefer to receive your super if you die while you're a member of the Mercer Super Trust
- your Tax File Number (TFN)
- if you would like to roll money from another super fund to establish membership.

Your Member Relation or the Retained Benefits category member with whom you have a Family Relationship with (who is already a member of the Plan), needs to complete and sign the 'Existing Anglican Super Member related to the applicant' section of this Application and Rollover Form.

Member Relation and Family Relationship are defined in the PDS.

Don't forget to sign them and return them to: Mercer Super Trust GPO BOX 4303 Melbourne VIC 3001

If you're unsure of your decisions, we recommend that you see a licensed, or appropriately authorised, financial adviser.

Contact details	here'r
Please print in black or blue pen, in uppercase, one character per box. A 🖉 Title Mr O Mrs O Ms O Miss O	Date of birth
Given names	
Surname	
Postal address	
Suburb	State Postcode
Telephone     Mobile*               Email*	
Email*	
	of usage of your email address and mobile phone number.
Email* Email* Providing your email address and mobile phone number *See 'Signature and Declaration' section of this Application and Rollover Form for details Name of your plan in the Mercer Super Trust	of usage of your email address and mobile phone number.
Email* Email* Providing your email address and mobile phone number *See 'Signature and Declaration' section of this Application and Rollover Form for details	of usage of your email address and mobile phone number.
Email*         Providing your email address and mobile phone number         *See 'Signature and Declaration' section of this Application and Rollover Form for details         Name of your plan in the Mercer Super Trust         A       N       G       L       I       C       A       N       S       U       P       E       R       I       I       I       C       A       N       S       U       P       E       R       I	

Anglican Super Application and Rollover Forr

06/2022



Issued by Mercer Superannuation (Australia) Limited (MSAL) ABN 79 004 717 533, AFSL 235906, as trustee of the Mercer Super Trust, ABN 19 905 422 981. Address: GPO Box 4303, Melbourne Vic 3001. Tel: 1800 682 525. MERCER and Mercer SmartPath are Australian registered trade marks of Mercer (Australia) Pty Ltd ABN 32 005 315 917.

## Contributions

A minimum contribution of \$1,000 is required to establish membership as a Category Family member and Retained Benefits Family member in the Anglican Super. Any balance required to make up for the minimum contribution amount may be transferred from other approved super funds (see' How to open an account' section of the PDS for more information).

#### **Personal contributions**

You (as a Category Family member and Retained Benefits Family member) can make contributions at any time once the minimum contribution has been made to Anglican Super on your behalf. If you are working, that employer can also make contributions to the Plan on your behalf. See the 'How super works' section of the PDS for more information.

#### Investment options

You can select investments online at mercersuper.com.au (using your personal login) or by calling the Helpline.

If you don't make an investment selection, you'll automatically be invested in the default investment option which is the Mercer SmartPath investment option. Your super will remain in the Mercer SmartPath investment option until the trustee has processed any alternative investment choice you have made.

Mercer Ready-made investment options	Percentage to be invested
Mercer SmartPath	%
Mercer Diversified Shares	<u> </u>
Mercer High Growth	<u> </u>
Mercer Select Growth	<u> </u>
Mercer Moderate Growth	<u> </u>
Mercer Conservative Growth	%
Select-your-own investment options (list any chosen Select-your-own option in the spa	ce below)
1.	
2.	
3.	
4.	
5.	
6.	
8.	
9.	
Total (must eq	ual 100%)

# Insurance - Death only cover or Death and Total and Permanent Disablement (TPD) cover

You only need to complete this section if you want to apply for Death only or Death and Total and Permanent Disablement (TPD) insurance cover. I understand that if I don't make a valid choice by selecting one of the options below, I will not be provided with any insurance cover.
(Select one option only)
I'd like to apply for Death insurance cover of \$,,, (must be a multiple of \$1,000 and subject to a minimum of \$30,000)
I'd like to apply for Death and TPD insurance cover of \$, (must be a multiple of \$1,000 and subject to a minimum of \$30,000)
Special note: Your insurance cover is subject to the terms and conditions of the insurance policy and acceptance by the Insurer. You will require underwriting before your insurance cover commences. Your selected insurance cover will only commence once the Insurer accepts your application and you are advised of this in writing.

## **Your Beneficiaries**

You can nominate who you would like to receive your Death payout if you die while a member of the Anglican Super. This is an indication of your preference for the distribution of your Death payout unless you make a binding death benefit nomination. **The trustee of the Mercer Super Trust will not be legally bound by your wishes but will take them into account.** For more information about making a binding death benefit nomination call the Helpline or refer to the *Beneficiaries* Fact Sheet available at **mercersuper.com.au/pds.** 

Name				
Relationship to you*				
Name				
Relationship to you*				
Name				
Relationship to you*				
Name				
Relationship to you*				
Name				
Relationship to you*				
Total 1 0 0 %				
* must be a Dependant or be your legal personal representative (or the executor of your will). Dependant is defined in the <i>Beneficiaries</i> Fact Sheet.				



## Your Tax File Number (TFN)

#### **Provide your TFN**

Your TFN is confidential and it is not an offence to not provide your TFN. However, in line with the *Superannuation Industry (Supervision) Act 1993*, the trustee of the Mercer Super Trust is authorised to ask for your TFN. The trustee will only use your TFN for lawful purposes. These purposes may change in the future if there are changes to legislation.

You should note that if you don't provide your TFN, the trustee will be unable to accept any contributions for you and as a result be unable to accept your application for membership in Anglican Super.

Name	
Date of birth	
My Tax File Number is	
Provide your consent to us to search for your other super	accounts using your TFN
In accordance with the Superannuation Industry (Supervision) Act 1993 we	
for other superannuation monies that you may have with the ATO or other	
assistance to consolidate these funds into your current account.	
Laive my concert for the Marcer Cuper Trust or any successor fund to	use my TEN to coarch for other superannuation monies for mo from the
ATO or another superannuation provider and to facilitate consolidati	o use my TFN to search for other superannuation monies for me from the
Aro or another superannuation provider and to racintate consolidation	on or my accounts.
Signature D	Date
×	
The Mercer Super Trust will only use your TFN in accordance with your cons or by contacting the Helpline.	sent. The consent will remain in place until cancelled by you in writing
The Mercer Super Trust requires your TFN and your consent to use your TFN and cannot search without it.	I to search the ATO database for other super accounts on your behalf
If any amounts located from the search process are held by the ATO, in resp special account credits, these balances will be transferred to your account v	

This consent does not cover facilitating a consolidation of accounts you may already hold in the Mercer Super Trust. Call the Helpline to consolidate your Mercer Super Trust accounts.

## Existing Anglican Super Member related to the applicant

Given Name	
Surname	
Member number	
Relationship of applicant with the related member	
Spouse (including de facto spouse)	Child (including an adopted child, a step child and an ex-nupital child)
Parent	You are in an Interdependency Relationship as defined in the Superannuation Industry (Supervision) Act 1993 (Cth)
Sibling	Grandparent
Grandchild	Father/mother-in-law
Brother/sister-in-law	Son/daughter-in-law

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## Rollover other super money into Anglican Super

If you have super money with more than one previous super provider, you'll need to complete an online rollover request at **mercersuper.com.au** (sign in using your personal login) or call the Helpline. Once your previous super money has been received and credited to your super account balance, you'll receive confirmation from the Plan.

Name of previous fund or policy			
Address of previous fund			
Suburb		State	Postcode
Membership or policy number	Approximate value		
	\$	-	

I request that you transfer the total value held in respect of me for the above super fund or policy to the Mercer Super Trust:

- I understand that on payment by my previous super fund, I discharge that super fund from any further liability in respect of the amount transferred.
- I approve the deduction of any appropriate exit fees from the amount transferred subject to legislative restrictions.
- I request that any further contributions received by my previous super fund after my payment, be redirected to my membership with the Anglican Super.
- I understand that information contained in this form will be handled by the trustee of Anglican Super to process my rollover.
- I understand and consent to my information being collected, disclosed and used in the manner set out in this form.
- I understand that I will receive confirmation once my money has been received in Anglican Super.
- I understand that I have the right to ask my previous super fund for information that I reasonably require for the purpose of understanding any super entitlements I may have in that fund, including information about any fees and charges that may apply to the transfer and information about the effect of the transfer on any entitlements I have in my previous super fund. I confirm that I do not require such information from my previous fund.

Signature

X

Make sure you sign and date your completed form and send it to: Mercer Super Trust, GPO Box 4303 Melbourne 3001.

Date



#### 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 Mercer Super Trust
  - the cheque to
  - a Rollover Benefit Statement

GPO Box 4303 Melbourne VIC 3001

- other associated documentation

## 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	Date
×	

