

## Application Form to join Mercer Tailored Super - Choice section

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



This Application Form is for applying for participation in Mercer Tailored Super (the Plan), a plan in the Corporate Superannuation Division in the Mercer Super Trust under the Product Disclosure Statement dated 1 April 2023. Retained Benefits members should not complete this Application Form. Retained Benefits members who wish to alter any contact details, change investment options or apply for 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
- how much basic Death and Total and Permanent Disablement (TPD) cover you'd like
- if you want to receive Total but Temporary Disability (TTD) cover (where eligible)
- who you'd prefer to receive your super if you die while you're a member of the Mercer Super Trust

# Once you've completed this form, don't forget to sign it and return it to:

Mercer Super Trust

#### GPO 4303 Melbourne VIC 3001

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

To provide us your Tax File Number, please call the Helpline on **1800 682 525**. Once you have received your personal login details, you can also update your Tax File Number online at **mercersuper.com.au** (sign in using your personal login).

Contact Details	her
Please print in black or blue pen, in uppercase, one character per box. $lacksquare$	
Title: Mr     Mrs     Miss     Other     Date of birth     /     /	
Postal address	
Suburb State Po	ostcode
Telephone     Mobile – see note below       -     -	
Providing your email address and mobile phone number See 'Signature and Declaration' section of this Application Form for details of how we use your email address and mobile phon Name of your plan in the Mercer Super Trust	ne number.
A C C U M U L A T I O N ( C H O I C E )	
A C C U M U L A T I O N ( C H O I C E ) S E C T I O N	

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4/2023



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 trademarks of Mercer (Australia) Pty Ltd (Mercer) ABN 32 005 315 917.

## **Investment Options**

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

Your super will remain in the Mercer SmartPath investment option until the trustee has processed any alternative investment choice you have made.

If you wish to invest in the Mercer Direct investment option, this can only be selected after you have joined the Plan and if you have the required minimum amount in your super account balance. You can then choose to invest part of your super in the Mercer Direct investment option online only (using your personal login). For further details please read the *Investments* booklet and the *Mercer Direct Member Guide* or call the Helpline.

## Insurance - Death and Disability cover

#### Death and Total and Permanent Disablement (TPD) cover

I'd like the following total number of units of basic insurance cover for Death and TPD.

I understand that if I don't make a valid choice, the default of three units will apply where I am eligible for insurance cover.

(Select one box only)	1 unit	2 units	3 units	4 units	5 units	6 units

You can generally choose up to six units of cover without underwriting, as long as you joined the Plan when first eligible for insurance cover and your insurance election is received by the Plan within the period, from the date of commencing employment and no later than 60 days from the date your Employer pays the first SG contribution on your behalf.

#### Voluntary Insurance cover

You may be eligible to apply for Voluntary Insurance cover. Please call the Helpline for more details.

The granting of Voluntary Insurance cover will be subject to underwriting and will only commence once the Plan Insurer accepts your application.

#### Total and Temporary Disablement (TTD) cover

If eligible, you can elect to have TTD cover - please select one box only.

I understand that if I don't make a valid choice by ticking one of the boxes below, I will not be provided with TTD cover.

Yes, I want to have TTD cover.

I elect not to have TTD cover.

Note: You will require underwriting before your TTD cover commences.

You can apply to cancel or opt out of your insurance cover at any time by completing the relevant form available from the Helpline.

Note: Your insurance cover is subject to the terms and conditions of the insurance policy and acceptance by the Insurer. You may require underwriting before your insurance cover commences. Your Death and TPD cover will be limited to New Events cover only if you are not At Work on the date your cover commences. This limitation will stop on the day after you have been At Work for 30 consecutive days.



## Your Beneficiaries

You can nominate who you would like to receive your Death payout if you die while a member of Mercer Tailored Super. Once you have received your personal login details, you can also nominate your preferred beneficiaries online at **mercersuper.com.au** (sign in using your personal login). This is only an indication of your preference for the distribution of your Death payout, as the trustee will not be legally bound by your wishes unless you make a binding death beneficiary nomination. 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				7
Relationship to you*			Proportion of payout	9
Jame				_
Relationship to you*			Proportion of payout	9
Jame				
				]
Relationship to you*			Proportion of payout	9
Name				
				7
Relationship to you*			Proportion of payout	9
Name				
				7
				1
				4
Relationship to you*			Proportion of payout	%
			Total 1 0 0	%
* must be a Dependant or be your legal personal	representative (or the executor of vol	r will). Dependant is defined in the Benefic	iaries Fact Sheet.	_

# Provide your consent to us to search for your other super accounts using your Tax File Number (TFN)

In accordance with the *Superannuation Industry (Supervision) Act 1993* we can search the Australian Taxation Office (ATO) database using your TFN for other superannuation monies that you may have with the ATO or other superannuation funds. We will advise you of the results and can provide assistance to consolidate these funds into your current account.

I give my consent for the Mercer Super Trust or any successor fund to use my TFN to search for other superannuation monies for me from the ATO or another superannuation provider and to facilitate consolidation of my accounts.

Date

Signature

X

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The Mercer Super Trust will only use your TFN in accordance with your consent. The consent will remain in place until cancelled by you in writing or by contacting the Helpline.

The Mercer Super Trust requires your TFN and your consent to use your TFN to search the ATO database for other super accounts on your behalf and cannot search without it.

If any amounts located from the search process are held by the ATO, in respect to Superannuation Guarantee or Superannuation Holding Account special account credits, these balances will be transferred to your account within the Mercer Super Trust.

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.



## 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.
- apply to be an Accumulation (choice) member of Mercer Tailored Super in the Mercer Super Trust.
- accept that I will be bound by the provisions of the trust deed, designated rules and benefit design schedule which govern the operation of the Plan and the Mercer Super Trust.
- agree to be automatically transferred to the Retained Benefits section of the Plan in the Mercer Super Trust on leaving my Employer or where I have directed my Employer to pay Superannuation Guarantee contributions on my behalf to another fund (if my super account balance is at least \$500).
- 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 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 series of booklets (that are part of the PDS) and they should be read before I make
  a decision about the Plan 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
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Make sure you sign and date your completed form and	l send it to: Mercer Super Trust, GPO Box 4303, Melbourne 3001.

