

About this form

- 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.

Once you and your Spouse have completed and signed the Application form and Rollover form (if applicable), 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

Date of birth / /

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State

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Providing your email address and mobile phone number

Your email address and mobile phone number are used for online account access.

See 'Signature and Declaration ' section of this Application and Rollover Form for additional details of usage of your email address and mobile phone number.

Name of your plan in the Mercer Super Trust

M	E	R	C	E	R		T	A	I	L	O	R	E	D		S	U	P	E	R	-	R	E	T	A	I	N	E	D	
B	E	N	E	F	I	T	S		A	N	D		S	P	O	U	S	E		S	E	C	T	I	O	N				



You can choose up to 10 investment options for your account. Refer to the *Investments* booklet for your Plan for a list of the investment options available in your Plan, including important information about each option. The *Your Plan Fees and Benefits* booklet for your Plan provides information about the fees and costs that apply for each investment option.

If you wish to invest in the Mercer Direct investment option, you can only select this option 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 Mercer Direct online only at mercersuper.com.au (using your personal login details). For further details please read the *Investments* booklet and the *Mercer Direct Member Guide* or call the Helpline.

If you don't make an investment selection below, or if your investment selection is invalid (e.g. the total of your selected options does not equal 100% or your selection includes an invalid option), your full balance will be invested in the default investment option, Mercer SmartPath, which is the MySuper product for your Plan. **Your super will remain in Mercer SmartPath until you notify us otherwise.**

Your selected investment options (or the default option if you don't make a selection or your selection is invalid) will also apply to any future contributions to your account (including rollovers and most other cashflows) until you notify us otherwise.

Once you have joined the Plan, you can select investment options online at merciersuper.com.au (using your personal login) or by calling the Helpline.

(please write the option's full name as written in the *Investments* booklet)

Percentage
to be invested

	1	2	3	4	5	6	7	8	9	10				
1.														%
2.														%
3.														%
4.														%
5.														%
6.														%
7.														%
8.														%
9.														%
10.														%
Total (must equal 100%)											1	0	0	%



Insurance

If you don't make a valid choice by selecting one of the options below, you 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)

☐ I'd like to apply for Death and TPD insurance cover of \$ (must be a multiple of \$1,000)

Beneficiaries	
1	1
2	2
3	3
4	4
5	5
6	6
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11	11
12	12
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100	100

Non-binding nomination by completing this section below which is an indication of your preference and is non-binding on the trustee, or **Binding nomination** (lapsing or non-lapsing) by completing the Binding death benefit nomination form available at mercersuper.com.au or by contacting our Helpline.

Name

☐☐☐

☐☐☐

Relationship to you* ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐ Proportion of payout ☐☐☐ %

Relationship to you* ☐ Proportion of payout ☐ ☐ ☐ %

Relationship to you* ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ Proportion of payout ☐ ☐ ☐ %

Relationship to you* ☐ Proportion of payout ☐ ☐ ☐ %

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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 *Beneficiaries Fact Sheet*.

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](https://www.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.

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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 request that any further contributions received by my previous super fund after my payment, be redirected to my membership with the Mercer Tailored Super.
- I understand that information contained in this form will be handled by the trustee of Mercer Tailored Super to process my rollover.
- I understand and consent to my information being collected, used and disclosed in the manner set out in the **Privacy Policy**.
- I understand that I will receive confirmation once my money has been received in Mercer Tailored 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.

X

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Name of Fund: Mercer Super Trust ABN: 19 905 422 981

- 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 1993.

- Please forward:
 - this authority
 - a Rollover Benefit Statement
 - other associated documentation
- to Mercer Super Trust
GPO Box 4303
Melbourne VIC 3001

Your privacy

We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information about the other products and services offered by us and our related companies. If you do not wish to receive marketing material, please contact us on **1800 682 525**.

Our Privacy Policy is available to view at **mercersuper.com.au/privacy** or you can obtain a copy by contacting us on **1800 682 525**.

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

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

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

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

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

If you have any other queries in relation to privacy issues, you may contact us on **1800 682 525** or write to our Privacy Officer, **GPO Box 4303, Melbourne VIC 3001**.

The Privacy Policy of AIA Australia can be obtained by visiting **www.aia.com.au/privacy**. By completion of this form, you consent to any personal information, including information that may be of a sensitive nature we may in the manner set out in these Privacy Statements collect about you in the normal course of our business, being used as outlined in the AIA Australia Privacy Policy.



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.

Before submitting this application, you should read and understand the PDS (and its incorporated documents) for Mercer Tailored Super. You can obtain a copy of the PDS (and its incorporated documents) at mercersuper.com.au/pds or by calling the Helpline on **1800 682 525**.

If the trustee accepts your application for membership, your rights as a member in the Mercer Super Trust will be determined by the provisions of the trust deed of the Mercer Super Trust and designated rules of the Corporate Superannuation Division which govern the operation of Mercer Tailored Super. You can obtain a copy of these governing rules at mercersuper.com.au/governance, or by calling the Helpline on **1800 682 525**.

You should consider obtaining professional advice if you are unsure about your application to become a member of Mercer Tailored Super in the Corporate Superannuation Division of the Mercer Super Trust.

You should contact us by calling the Helpline on **1800 682 525** if you need any further information.

By signing this form, I:

- Declare that I am eligible to become a Retained Benefits and Spouse section member of Mercer Tailored Super.
- Declare that the person who completed and signed the 'Existing Mercer Tailored Super member related to the applicant' section of this Application and Rollover Form is my Spouse and already a member of Mercer Tailored Super.
- Understand and consent to my information being collected, used and disclosed in the manner set out in the *Privacy Policy*.
- 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.
- 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

/ /

Make sure you sign and date your completed form and send it to:

**Mercer Super Trust
GPO Box 4303
Melbourne VIC 3001**

