





**Investment options (continued)**

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9.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%		
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																							<b>Total (must equal 100%)</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%

**Insurance - 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)

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

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 Mercer Tailored Super. Once you have received your personal login details, you can also nominate your preferred beneficiaries online at [mercersuper.com.au](https://mercersuper.com.au) (sign in using your personal login). This is 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](https://mercersuper.com.au/pds).

Name

  

Relationship to you\*  Proportion of payout  %

Name

  

Relationship to you\*  Proportion of payout  %

Name

  

Relationship to you\*  Proportion of payout  %

Name

  

Relationship to you\*  Proportion of payout  %

Name

  

Relationship to you\*  Proportion of payout  %

Total    %

\*must be a Dependant or be your legal personal representative (or the executor of your will). Dependant is defined in the *Beneficiaries* 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 Mercer Tailored 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 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.

Signature

Date

/ / 

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.

## Existing Mercer Tailored Super member to complete

I

a member of Mercer Tailored Super, nominate my Spouse (named under the contact section of this Application and Rollover Form) to become a Retained Benefits and Spouse member of Mercer Tailored Super from the date the trustee receives this Application and Rollover Form and I agree to make at least one Spouse contribution in accordance with the PDS and the 'Contributions' section of this Application and Rollover Form.

To initiate my Spouse's membership in the Plan, I elect to: (you must select one)

Make a Spouse Contribution of \$  totalling to at least \$1,000 via payroll deduction. I understand I must arrange with my payroll office to process from my regular pay (please complete *Your spouse's contributions to the Mercer Super Trust Form*).

Make a lump-sum Spouse Contribution via cheque for \$  totalling to at least \$1,000. Please make the cheque payable to **Mercer Super Trust – Mercer Tailored Super**. (please complete and attach *Your spouse's contributions to the Mercer Super Trust Form*).

Make a Spouse contribution of \$  and rollover amount of \$  totalling to at least \$1,000 please complete and attach *Your spouse's contributions to the Mercer Super Trust Form*. (The Retained Benefits and Spouse member will need to complete the Rollover other super money into Mercer Tailored Super section of this *Application and Rollover Form*).

Signature

Date

/ / 


## Rollover other super money into Mercer Tailored 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](http://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

Previous fund's Unique Superannuation Identifier (USI)/Electronic Service Address (ESA)\*

Telephone number

Licensee name

Membership or policy number

Approximate value

\$ , ,  -

\* All payments to/from a Self Managed Super fund (SMSF) must use SuperStream to roll over your super benefits. This means for a SMSF rollover you will need to supply the Electronic Service Address (ESA).

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 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, 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 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.

Signature

Date

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

### Notes for previous superannuation provider

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

When transferring money in to Mercer Tailored 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
- Please forward:
  - this authority
  - a Rollover Benefit Statement
  - other associated documentationto 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 [mercersupertrust.com](http://mercersupertrust.com) 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](http://www.aia.com.au). 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.

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 Retained Benefits and Spouse member of Mercer Tailored Super.
- declare that the person who completed and signed the 'Existing Mercer Tailored Super member to complete' section of this Application and Rollover Form is my Spouse and already a member of Mercer Tailored 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.
- understand and consent to my information being collected, disclosed and used 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.
- 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 Mercer Tailored 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

□□ / □□ / □□□□

