





## Insurance

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

I'd like the following level of insurance cover for Death and TPD.

I understand that if I don't make a valid choice by ticking one of the boxes below, the default of Level 4 will apply.

*(Select one box only)*

- Level 1 – 5% of Salary for each year and complete month from date of death or TPD to age 65
- Level 2 – 10% of Salary for each year and complete month from date of death or TPD to age 65
- Level 3 – 15% of Salary for each year and complete month from date of death or TPD to age 65
- Level 4 – 20% of Salary for each year and complete month from date of death or TPD to age 65
- Level 5 – 25% of Salary for each year and complete month from date of death or TPD to age 65
- Level 6 – 30% of Salary for each year and complete month from date of death or TPD to age 65
- Level 7 – 35% of Salary for each year and complete month from date of death or TPD to age 65
- Level 8 – 40% of Salary for each year and complete month from date of death or TPD to age 65

Each complete month counts as 1/12th of a year

You can generally choose up to Level 7 of cover without underwriting, as long as your insurance election is received by your 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 and the amount of cover you applied for does not exceed the Automatic Acceptance Limit of Mercer Tailored Super.

### Income Protection (IP) cover

If eligible, you can elect to have IP cover – please select one box only. You will require underwriting before cover commences.

I understand that if I do not select the option below, I will not receive IP cover.

- Yes, I want to have IP cover.

### Changing Cover

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 (and exclusions) 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.

### 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 your Plan's Insurer accepts your application.







## 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** (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

 - 

ABN

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)/ABN.

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.

Signature

Date

, , 

### 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 1993.
- Please forward:
  - this authority to Mercer Super Trust
  - a Rollover Benefit Statement to GPO Box 4303
  - other associated documentation to 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](https://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](https://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](https://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](https://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:

- Apply to be an Accumulation (default) member of Mercer Tailored Super.
- 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) 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

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

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

