



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.

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 change your investment options online at [mercersuper.com.au](https://mercersuper.com.au) (using your personal login) or by calling the Helpline.

**Percentage  
to be invested**

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



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.

☐ 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.

## 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.

[illegible]

Date of birth   /   /

**My Tax File Number is**

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.

X

□ □ □ / □ □ □ / □ □ □ □ □

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 Anglican Super Member related to the applicant (if applicable)

This section is only mandatory for joining the plan as a Family member. This section is not applicable to those joining as a Community category member. The existing Anglican Super member must complete their details.

☐ Joining as a Family Member

Given Name

Surname

Member number

Relationship of applicant with the related member

☐ Spouse (including de facto spouse)

☐ Parent

☐ Sibling

☐ Grandchild

☐ Brother/sister-in-law

☐ Child (including an adopted child, a step child and an ex-nuptial child)

☐ You are in an Interdependency Relationship as defined in the Superannuation Industry (Supervision) Act 1993 (Cth)

☐ Grandparent

☐ Father/mother-in-law

☐ Son/daughter-in-law

## 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](http://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](http://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

Before submitting this application, you should read and understand the Product Disclosure Statement (and its incorporated documents) for Anglican Super. You can obtain a copy of the Product Disclosure Statement (and its incorporated documents) at [mercersuper.com.au/pds](http://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 Anglican Super. You can obtain a copy of these governing rules at [mercersuper.com.au/governance](http://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 Anglican 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 Family Members and Community category 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 'Existing Anglican Super Member related to applicant' section of this Application is related to me (as defined in the PDS) and already a member of Anglican Super.
- agree to be automatically transferred to the Community 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, 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 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.

Signature

X

Date

□□ / □□ / □□□□

**Make sure you sign and date your completed form.**



## 2 easy ways to return your form

To make submitting your completed form as simple as possible, we've provided two easy options for you to choose from. Please read through the choices below and select the one that's more convenient for you.



### Email Us\*

Send back your form via email. It's quicker if you use your email address you use to log in and send to

**MST@Mercer.com**

Please see below note for submitting forms via email.



### Post it back

Otherwise, you can always send it back to us using the below postal address

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

#### \*Email note:

This is a 'no-reply' mailbox and should only be used to submit a form.

- Only one form per email can be accepted to ensure each form and its supporting documentation is processed correctly.
- A total of 6 attachments per form/email with a maximum size limit of 14MB.
- The file formats accepted are PDF, JPEG, PNG and JPG.

If you have an inquiry, please submit this via the contact us page or call the Helpline on **1800 682 525**.

