

Step 1: Complete your personal details

Telephone

 -

Mobile - see note below

Email - see note below

Providing your email address and mobile phone number

See the 'Signature and Declaration' section of this *Application Form* for details of how we use your email address and mobile phone number.

Step 2: Your TFN

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

Title: Mr Mrs Ms Miss Other Date of birth / /

Given names

Surname

Residential address (must be provided)

Suburb

State

Postcode

Postal address (if different from above)

Suburb

State

Postcode

Let us know your Tax File Number (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.

If you don't provide your TFN, you may pay additional tax. To minimise any extra tax being withheld from your pension payments, you will also need to complete and return an ATO Tax file number declaration form, a copy of which is available by calling the Helpline.

My tax file number is

Step 3: Pension options, preservation declaration and tax deductions

Select the pension you are applying for

(Select one option only)

- Allocated Pension**
 Transition to Retirement Allocated Pension

Preservation declaration

(Select one option only)

I declare that I:

- was born in the period 1 July 1963 to 30 June 1964, am now 59 years or over and do not intend to work more than 10 hours a week ever again
- was born after 30 June 1964, am now 60 years or over and do not intend to work more than 10 hours a week ever again
- am at least 60 years of age and have resigned or retired from an employer since turning age 60
- have reached my preservation age (for Transition to Retirement Allocated Pensions only).
- I am at least 65 years of age (for Allocated Pensions only).
- am permanently incapacitated*

* If you tick this option the trustee will require supporting evidence as to your medical condition. Please call the Helpline for more details on the evidence required before your application can be accepted.

Have you finalised your tax deductions?

Have you finalised any tax deductions you intend to claim for any personal contributions made with your super fund this financial year?

- Not applicable (continue to the next section of the application form)
- Yes (continue to the next section of the application form)
- No (You must finalise the tax deduction with your super fund before you transfer your super to your MSRI account).

Step 4: Make your initial investment

Your initial investment must be at least \$10,000.

Remember if you have multiple rollovers from different sources, it may be in your best interest to first combine them in your applicable division of the Mercer Super Trust or another superannuation fund before making your investment in Mercer SmartRetirement Income.

There is a limit (Transfer Balance Cap) on the amount of money you can transfer into the Retirement Phase of superannuation. If you exceed the Transfer Balance Cap you will be required to remove the excess and may be liable for additional tax. Please go to www.ato.gov.au/individuals/super for further information.

Note: If you are going to continue to receive Superannuation Guarantee (SG) payments from your employer, consider leaving money in your super account so there is an active account for these funds to accumulate in.

(Select one option only)

I am:

- transferring from another approved superannuation arrangement and I have attached a completed *Rollover* form.
- transferring from my account in the Mercer Super Trust:

Member Number

Plan/product name:

If you have selected a transfer from Mercer Super Trust, please choose one option below for your transfer amount:

- A partial amount of \$, .
- Close my super account** (this means that your entire benefit will be transferred to your Mercer SmartRetirement Income account and your super account will be closed)
- Keep my Mercer Super Trust super account open** – transfer all except for \$5,000 (or all except for \$500 from the Individual Section) of my accumulation style super account

Please go to mercersuper.com.au or contact the Helpline to get the *Rollover* form if you are transferring from another approved superannuation arrangement.

Step 5: Investment options

Initial investment selection

- If you are transferring directly from a Mercer Super Trust accumulation product (e.g. Mercer Business Super, Mercer SmartSuper, Corporate Superannuation Division (CSD) and you do not want to change how your super is invested then you do not need to complete the table below.
- If you do not complete the table below then your super will continue to be invested in the same investment options, where possible, or if not, in the investment option(s) that most directly correspond to those in which your super was invested in your Mercer Super accumulation account. See 'How to choose your investments' in the MSRI *Investments* booklet for more details.
- If you wish to invest in the **Mercer Direct** investment option this can only be selected after you have joined MSRI and once you have the required minimum amount in your account balance. You can then choose to invest part of your account balance in the **Mercer Direct** investment option (minimum amount of \$20,000) online only (using your personal log in details). The Mercer Direct investment option is not available to Transition to Retirement Allocated Pension members who are not eligible for untaxed earnings. For further details please read the *Investments* booklet and *Mercer Direct Member Guide* or call the Helpline.
- If you are not transferring directly from a Mercer Super Trust accumulation product and you don't make a selection in the table below, you'll automatically be invested in the default investment option, which is the **Mercer SmartPath** investment option, or the **Taxed Mercer SmartPath** investment option if you are a Transition to Retirement Allocated Pension member.

You can choose one or more of the **Ready-made** or **Select-your-own** investment options or a mix of both (maximum of 10 options). Refer to the MSRI *Investments* booklet for a list of the investment options available to you, including important information about each option. The MSRI PDS provides information about the fees and costs that apply for each investment option.

Please ensure the total in the table below adds to 100% otherwise the default investment option will apply until you notify us otherwise.

Investment options (please write the full name of each of your selected investment options (as written in the <i>Investments</i> booklet) in the space below)	% invested
1. <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
2. <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
3. <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
4. <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
5. <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
6. <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
7. <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
8. <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
9. <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
10. <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
Total (must equal 100%)	1 0 0 %

Pension payment investment selection

If you have chosen more than one investment option for investing your account balance, you can choose to have your pension payments made from nominated investments or a priority election. Please choose either Option 1 or Option 2 (below), but not both. You cannot nominate the **Mercer Direct** investment option for your pension payments.

Each time you make an investment in the **Mercer Direct** investment option, you must reconfirm (or change if applicable) your pension payment investment selection. This will be done as part of the online process for making an investment in the **Mercer Direct** investment option.

In the future, if you complete and return a new *Changing your investment options in the Mercer Super Trust – Mercer SmartRetirement Income* form and do not complete Step 3 of that form, then any selection previously made under Option 1 or Option 2 (below), will become invalid and cease to apply.

Continued over

Step 5: Investment options (continued)

If you do not complete this section of the application form, your pension payments will be made in the same proportions as your account balance is invested.

Option 1: Nominated percentage (%) payments

You can choose to have your pension payments made from one or more of the investment options you selected for account balance. You can choose the same or different proportions to your current investments. For example, if your account balance is invested in 80% **Mercer Conservative Growth** and 20% **Mercer Select Growth**, you could choose to have your payments made from **Mercer Select Growth** only. To make this choice, you would write '**Mercer Select Growth**' and '100' in the percentage payment column in the table below.

Alternatively you could choose to have your payments made with 95% from **Mercer Conservative Growth** and 5% from **Mercer Select Growth**. To make this choice, you would write '**Mercer Conservative Growth**' and '95' the percentage payment column on one row of the table below and then '**Mercer Select Growth**' and '5' in the next row.

Once there's no longer enough money in your chosen option(s), payments will automatically be deducted from the account balance invested in your other options(s). You'll be notified at the time, and can adjust your investment choice if desired.

Option 2: Priority payments

You can choose the priority order from the investment options you selected for your account balance. Pension payments will only be made from one investment option at a time in the order you nominate. After your first nominated investment option is depleted, payments will then be made from your next nominated option until this has been depleted and will continue down your payment order. For example, if your account balance is invested in 50% **Mercer Conservative Growth**, and 50% **Mercer Select Growth**, you could choose to have your pension payments made in the order of 1. **Mercer Conservative Growth**, and 2. **Mercer Select Growth**. To make this choice, you would write '**Mercer Conservative Growth**' and '1' in the priority payment order column of the table below and then '**Mercer Select Growth**' and '2' in the next row.

Investment options	Nominated percentage (%) payments	or	Priority payment order (number 1 to 10 as required)
1. <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"/> <input type="text"/>		<input type="text"/>
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7. <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"/> <input type="text"/>		<input type="text"/>
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10. <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"/> <input type="text"/>		<input type="text"/>
Total		<input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>

Total 1 0 0 %

Step 6: Decide on your pension amount

I wish to receive an annual pension* as follows (select one option only):

- minimum amount permitted^
- maximum amount permitted (Transition to Retirement Allocated Pension only)^
- nominated amount of \$ *# p.a. (gross of tax)

Please note: If you have not ticked a box above, payments will initially be made at the minimum amount permitted^. Any amounts selected that are, or become, outside the minimum or maximum income levels will be adjusted each year to remain within these limits.

^ For further details of what pension amount you will receive in future years see the 'Payment Options' section of the PDS.

* For Transition to Retirement Allocated Pensions, this amount must be between the minimum and maximum permitted. For Allocated Pensions, this amount must be at least the minimum permitted. See the 'Payment Options' section of the PDS for details of the minimum (and where applicable maximum) annual pension amounts.

If you commence your pension part way through the financial year your payments for the rest of the financial year will be the pro-rata amount of the annual pension. This does not apply if you have chosen a Transition to Retirement Allocated Pension and you have nominated the maximum amount permitted.

Step 7: Select your method of payment

I want my pension to be paid as follows (tick one box):

- monthly quarterly annually

Date of first pension payment*: / /

* This date must be on or before 30 June in the current financial year, unless you joined the MSRI on or after 31 May in the financial year, in which case the date can be on or before 30 June in the next financial year. Your pension payments will commence on this date subject to you providing all of the necessary information at least 7 days before this date, otherwise your pension will commence on the 15th of the following month.

Please pay my pension to my nominated account (as shown below)*

My bank account details are as follows:

Name of institution

Account holder name

Branch BSB number - Account Number

* If you do not provide at least your nominated account details, we will be unable to commence your pension payments until you do.

Step 8: Reversionary Beneficiary Nomination - for continuing pension payments

On joining Mercer SmartRetirement Income and before your pension commences, you can make a reversionary beneficiary nomination. This nomination is **irrevocable** and can only be made to your dependant – see the 'Beneficiaries' section of the *Other Things You Should Know* booklet for more information. If you want to make this election, please provide your dependant's details in the space provided below. **Making a reversionary beneficiary nomination is not compulsory.** Alternatively, you can make a binding death benefit nomination (see below for details).

Name

Date of birth / /

Relationship to you

Proportion of payout

%

If you don't want to make a reversionary beneficiary nomination, you can make a binding death nomination for the payment of your death payout to one or more of your dependants or your legal personal representative (your estate) – see the 'Beneficiaries' section of the *Other Things You Should Know* booklet for more information. You can do this by completing and returning a *Making a binding death benefit nomination - Mercer SmartRetirement Income of the Mercer Super Trust* form. You can get a copy of this form by calling the Helpline or from the website www.mercersuper.com.au/nominating-your-superannuation-beneficiary.

If you have not made a reversionary beneficiary nomination on joining Mercer SmartRetirement Income (described above) or you do not have a valid binding death benefit nomination in effect at the time of your death, then the trustee will pay a pension (or a lump sum if a pension is not permitted) to your spouse. In the event that you do not have a spouse at the time of your death, the trustee will pay a lump sum equal to your account balance to your legal personal representative.

Step 9: Confirm if splitting contributions - complete only if transferring from an account in the Mercer Super Trust

If you are transferring from an accumulation account in the Mercer Super Trust and you wish to split your super contributions with your spouse for the current or previous financial years, you will also need to complete and return a *Splitting super contributions in the Mercer Super Trust* form. Note that contribution splits cannot be processed after your super has been transferred into your new pension account. It is important that any split request is lodged along with (or prior to) these payment instructions.

A copy of the *Splitting super contributions in the Mercer Super Trust* form, as well as a fact sheet providing additional information on contributions splitting, can be obtained from the website mercersuper.com.au/pds or by calling the Helpline.

Tick here if you intend to lodge a split request either prior to or with this form.

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 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. 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.

Step 10: Signature and Declaration

Don't forget to sign and return this form. You should also keep a copy for your records.

For identification purposes, you MUST provide a certified copy of proof of identity. See the "Completing proof of identity" section at the end of this form for details of certification and acceptable documents.

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 a member of Mercer SmartRetirement Income in the Allocated Pension Division of the Mercer Super Trust.
- accept that I will be bound by the provisions of the trust deed and designated rules which govern the operation of Mercer SmartRetirement Income.
- 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 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 pension, including 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 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 electronically 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
 - making it available to me on a website from where it can be downloaded.
- acknowledge that caps may apply to the amount I can transfer into the pension account and it is my responsibility to monitor.
- understand that all my super will be invested in the default investment option applicable to me (or the investment option(s) I have selected in this application) until I make an alternative investment choice and that choice is processed by the trustee.

I also acknowledge that I have read and understood the MSRI PDS and agree to be bound by it. I understand that the PDS contains a number of references to the *Investments* booklet dated 1 April 2023, the *Sustainable Investment Information* booklet dated 1 April 2023 and the *Other Things You Should Know* booklet dated 1 April 2023 (that are incorporated into and are part of the PDS) and they should be read before I make a decision about Mercer SmartRetirement Income.

Signature

X

Date / /

Return this completed Application Form, any supporting forms and your certified proof of identity to:

Allocated Pension Division – Mercer Super Trust

GPO Box 4303

Melbourne VIC 3001

Completing proof of identity

Primary photographic identification

You will need to provide a copy of **one** of the following primary identification documents:

- Current Australian or foreign driver's licence (including the back of the driver's licence if your address has changed)
- Australian passport
- Current foreign passport¹, or similar document issued for the purpose of international travel¹
- Current card issued under a State or Territory for the purpose of proving a person's age
- Current national identity card issued by a foreign government for the purpose of identification¹

Identification documents must not be expired (excepting an Australian passport which may be expired within 2 years).

Alternative identification

If you are unable to provide any primary photographic identification, you will need to provide two identification documents, one from each of the following lists:

- Birth certificate or birth extract¹
- Citizenship certificate issued by the Commonwealth
- Pension card issued by Centrelink that entitles the person to financial benefits

AND

- Letter from Centrelink or other Government body in the last 12 months regarding a Government assistance payment
- Tax Office Notice of Assessment issued in the last 12 months
- Rates notice from local council issued in the last 3 months
- Electricity, gas or water bill issued in the last 3 months
- Landline phone bill issued in the last 3 months (mobile phone bills will not be accepted)

Name change

If you have changed your name, you must provide a certified copy of the relevant name change document¹, for example, a Marriage Certificate issued by the Registry of Births Deaths & Marriages, Decree Nisi or Deed Poll (in addition to the above identification).

If your legal name or date of birth does not match exactly to our records (excluding aforementioned name changes), please contact us for further instructions.

Signing on behalf of another person

If you are signing on behalf of the applicant you will need to provide the following:

- A **certified** copy of the Guardianship papers or Power of Attorney; and
- A **certified** copy of the appropriate proof of identity for the holder of the Guardianship or Power of Attorney.

Note: Certified ID is also required for the member

¹Translation

If your identification is written in a language other than English, the identification must be accompanied by an English translation prepared by a certified translator accredited by the National Accreditation Authority for Translators and Interpreters Ltd (NAATI) or an equivalent accreditation.

How to certify documents

After sighting the original and the copy and making sure both documents are identical, the certifier must include on EACH page:

- Written or stamped 'certified true copy'
- Signature and printed full name
- Qualification (such as Justice of the Peace, Australia Post employee, etc)

Date (the date of certification must be within the 12 months prior to our receipt)

IDENTIFICATION

Certified true copy

J. Sample

Mr John Sample
Justice of Peace
Registration No.123456789

Date: 01/02/2012

A clear copy of the document that identifies you (i.e. your driver's licence (front and back) or passport)

Write or stamp 'certified true copy' of the original document

The authorised person's signature

Full name, qualification and registration number (if applicable) of the authorised person

Date of certification (within 12 months of receipt)

Verification

A verification of the certifying party may be performed. If a discrepancy arises, you may be requested to re-certify documentation.

Important Note

The information in this document is a guide only and we may request additional documentation prior to any payment.

Completing proof of identity (continued)

Who can certify documents in Australia?

- Permanent employee of the **Australian Postal Corporation** with 2 or more years of continuous service who is employed in an office supplying postal services to the public
- Agent of the **Australian Postal Commission** who is in charge of an office supplying postal services to the public
- **Architects**
- **Australian Consular Officer or Australian Diplomatic Officer** (within the meaning of the Consular Fees Act 1955)
- **Bailiff**
- **Bank officer, building society officer or credit union officer** (with two or more continuous years of service)
- **Commissioner for Affidavits or Declarations**
- **Court Officer**, Registrar or Deputy Registrar of a Court, Judge, Clerk, Magistrate, Master of a Court, Chief Executive Officer of a Commonwealth Court
- **Fellow of the National Tax Accountant's Association**
- **Financial Advisers and Financial Planners**
- **Finance Company Officer** (with two or more continuous years of service with one or more finance companies)
- **Justice of the Peace**
- **Legal practitioner**
- **Marriage celebrant** (registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961)
- **Medical practitioner, chiropractor, dentist, nurse, optometrist, physiotherapist, psychologist**
- **Member of Chartered Secretaries Australia**
- **Member of Engineers Australia** (other than at the grade of student)
- **Member of the Association of Taxation and Management Accountants**
- **Member of the Australasian Institute of Mining and Metallurgy**
- **Member of the Australian Defence Force** (who is an officer; or a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with two or more years of continuous service or a warrant officer within the meaning of that Act)
- **Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or Member of the Institute of Public Accountants**
- **Member of Commonwealth Parliament, State Parliament, Territory Legislature or a Local Government Authority** (State or Territory)
- **Midwives**
- **Minister of Religion** (under Subdivision A of Division 1 of Part IV of the Marriage Act 1961)
- **Notary Public**
- **Occupational Therapists**
- **Officer with, or Authorised Representative of an Australian Financial Services Licensee** (who has had at least two years of continuous service with one or more licensees)
- **Officer with, or a credit representative of, a holder of an Australian credit licence** (who has had at least two years of continuous service with one or more licensees).
- **Permanent employee of the Commonwealth** (or Commonwealth Authority) **or a State or Territory** (or State or Territory Authority) **or a Local Government Authority with two or more years of continuous service**
- **Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made**
- **Pharmacist**
- **Police Officer, Sheriff or Sheriff's Officer**
- **Registered Migration Agents**
- **Senior Executive Service Employee of the Commonwealth** (or Commonwealth Authority) **or a State or Territory** (or State or Territory Authority)
- **Teacher employed on a full-time basis at a school or tertiary education institution**
- **Trade marks attorney**
- **Veterinary surgeon**

Who can certify documents outside of Australia

- **an authorised staff member of an Australian Embassy, High Commission or Consulate**
- **an authorised employee of the Australian Trade Commission** who is in a country or place outside Australia
- **an authorised employee of the Commonwealth of Australia** who is in a country or place outside Australia
- **a Member of the Australian Defence Force** who is an officer or a non-commissioned officer with 5 or more years of continuous service
- **a Notary Public from a country ranked 129 or below in the latest Transparency International Corruptions Perception Index: <http://www.transparency.org>**