

Direct Debit Request form Super



Suncorp Portfolio Services Limited
ABN 61 063 427 958 (Trustee)
AFS Licence No 237905
RSE Licence No L0002059

Issued 5 April 2012

Please use this form to set up a regular contribution plan or change your nominated bank account.

Tips to help you complete this form.

- Use blue or black pen and BLOCK letters
- Use a cross (X) to mark answer boxes
- Complete all sections on the form and sign and date on page 3

Any questions? If you'd like help completing this form, or if you have any questions please contact your adviser or our Customer Service team on the following numbers:-

- If you are a member of Optimum – 1800 819 499
- If you are a member of Optimum Corporate for Standard Pacific – 1800 232 001
- If you are a member of Connelly Temple, Partnership or Workforce - 1300 361 755

Important: Before completing this form, please ensure we have your Tax File Number

Providing your Tax File Number (TFN) is not compulsory. However if you do not give us your TFN:

- We can't accept non-concessional contributions (includes personal after tax contributions made and spouse contributions received).
- You may pay additional tax on concessional contributions (includes personal before tax contributions, salary sacrifice, additional employer and compulsory employer contributions).

A. Personal details

| | |
|----------------|--|
| Account number | <input type="text"/> |
| Product name | <input type="text"/> |
| Title | <input type="text"/> |
| Given name(s) | <input type="text"/> |
| Surname | <input type="text"/> |
| Date of birth | <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| Street address | <input type="text"/> <input type="text"/> |
| Suburb/Town | <input type="text"/> |
| State | <input type="text"/> Postcode <input type="text"/> |
| Phone (home) | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> (work) <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| Mobile | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> Fax <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| Email | <input type="text"/> <input type="text"/> |

B. Tax File Number (TFN) notification

We are authorised to collect your TFN under the Superannuation Industry (Supervision) Act. Where we collect your TFN, it will be kept confidential and only used for lawful purposes which may include:

- finding or identifying your superannuation funds
- calculating tax on any superannuation lump sums
- providing your TFN and other information to the Commissioner of Tax
- providing your TFN to your future superannuation fund trustee or Retirement Savings Account (RSA) provider if you are transferring your account. We will not pass on your TFN if you write to us and tell us not to. We will not disclose your TFN to anyone else.

Providing your TFN is voluntary and declining to quote your TFN is not an offence. However, if you do not provide us your TFN, then:

- We can't accept non-concessional contributions (includes personal after tax contributions made and spouse contributions received).
- You may pay additional tax on concessional contributions (includes personal before tax contributions, salary sacrifice, additional employer and compulsory employer contributions).

TFN

Reason for Exemption

C. Details of account to be debited

If you wish to establish more than one direct debit, you can photocopy this page or obtain a Direct Debit Request form from our website via www.asteronlife.com.au

Please debit the following account:

Name of account holder

Bank, credit Union or Building Society

Branch

Branch BSB - Account No.

D. Details of the amount to be debited

Amount per month \$,

Contribution type Personal
 Spouse

Start date / /

Direct debit date

Your account will be debited on or around the:

- 1st of the month, if you a member of Connelly Temple or Partnership
- 15th of the month, if you are a member of Optimum or Workforce

E. Direct Debit Request (DDR) Service Agreement

This Direct Debit Request (DDR) Service Agreement is issued by Suncorp Portfolio Services Limited. It is applicable only if you choose to authorise us to debit amounts from your nominated financial institution account. You should direct all enquiries about your direct debit to the Customer Service team.

1. Our commitment to you

- a) We will give at least 14 days notice in writing before changing the terms of the debiting arrangements, unless the changes are made at your request.
- b) We will keep information relating to your nominated account confidential, except for the purposes of conducting direct debits with your financial institution.
- c) Where the debiting day is not a business day, we will draw from your nominated financial institution account on the next business day.

2. Your commitment to us

It is your responsibility to:

- ensure your nominated account can accept direct debits;
- ensure there are sufficient funds available in your nominated account to meet each direct debit on the due date;
- advise us if the nominated account is transferred or closed, or the account details change; and
- ensure that all account holders on the nominated account agree to the debiting arrangement.

3. Your rights

- a) You can change your debiting arrangement by informing us in writing, at least 7 working days before the debiting date for any of the following:
 - altering the DDR;
 - deferring a drawing;
 - stopping an individual debit;
 - suspending the DDR; and
 - cancelling the debiting arrangement completely.
- b) Where you consider that a debit has been initiated incorrectly, you should contact the Customer Service team. If we cannot resolve the matter, you can still refer it to your financial institution, which will obtain details of the disputed transaction from you, and may lodge a claim on your behalf.

4. Other information

- a) The details of our debiting arrangements are contained in the DDR.
- b) We reserve the right to ask that instructions from a client to stop the debiting arrangement are in written form.
- c) We reserve the right to ask that instructions to alter the debiting arrangement, are in written, verbal or electronic form.
- d) We can cancel your DDR by writing to you if debits are dishonoured by your financial institution.
- e) Financial institution fees (including dishonour charges) may also apply to this debiting arrangement.

F. Direct Debit Request Authorisation

- I/We authorise Suncorp Portfolio Services Limited (User ID 252606), until further notice in writing, to arrange for funds to be debited from the account nominated on this form.
- I/We confirm that I/we have read the DDR Service Agreement and understand that my authorisation will remain in force in accordance with the details set out in the agreement.
- I will notify the Trustee immediately if I am no longer eligible to contribute.

Signature

Date / /

Signature

Date / /

**Please send the completed form to: Customer Service team
GPO Box 1576
Sydney NSW 2001**