

Lutheran Super

Third party authority

Use this form to give other people access to the details of your Lutheran Super accounts – Super or Pension or both.

If you need help

For assistance call the Helpline on **1800 635 796**.

Step 1 – Complete your account and personal details

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



This request applies to the following Lutheran account/s:

Super account member number:

Pension account member number:

Title Mr Mrs Ms Miss Other Date of birth / /

Given names

Surname

Daytime Telephone

Phone (mobile)

- -

Street address

Suburb

State

Postcode

E-mail address

Do you give Lutheran Super permission to contact you via email? Yes No

Step 2 – What is your relationship to the person/s you are nominating

You can nominate people in one or both categories:

Personal relationship: your partner or another family member or friend (*please complete Step 3*)

Professional relationship: a person who is providing you with advice. This may include a financial planner, accountant or legal representative (*please complete Step 4*)

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Step 3 – Please provide details of appointed individuals (if applicable)

You can nominate as many people as you would like. Please provide their details below. To nominate more than three people, please complete another form.

Family or friend 1

First name

Last name

How this person is related to you (*select one option only*)

Partner Parent Guardian Sibling Other family member Friend

Family or friend 2

First name

Last name

How this person is related to you (*select one option only*)

Partner Parent Guardian Sibling Other family member Friend

Family or friend 3

First name

Last name

How this person is related to you (*select one option only*)

Partner Parent Guardian Sibling Other family member Friend

Step 4 – Please provide details of the appointed financial services or legal representative/s (if applicable)

This section allows you to nominate one company/practice and up to three representatives from that company/practice. If you choose to nominate more than one company/practice or additional representatives you will need to complete another third party authority form.

Company/practice details

Company/practice name

Company/practice street address

Suburb/town

State

Postcode

Company/practice postal/address (if different from street address above)

Suburb/town

State

Postcode

Phone (work)

Fax

Phone (mobile)

ABN

AFSL

Representative 1

First name

Last name

E-mail address

Is the person a Certified Financial Planner (CPF®): Yes No

Continued over



Step 4 – Please provide details of the appointed financial services or legal representative/s (if applicable) continued

Representative 2

First name

Last name

E-mail address

Is the person a Certified Financial Planner (CPF®): Yes No

Representative 3

First name

Last name

E-mail address

Is the person a Certified Financial Planner (CPF®): Yes No

Your Privacy

The Fund is administered by us along with our service provider, Mercer Outsourcing (Australia) Pty Ltd. 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 635 796**.

Our Privacy Policies are available to view at www.lutheransuper.com.au or you can obtain a copy by contacting us on **1800 635 796**. 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, 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 Mercer's processing centre in India. Our Privacy Policies list all other relevant offshore locations.

Our Privacy Policies set 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 635 796** or write to the Lutheran Super Privacy Officer, GPO BOX 4303, Melbourne, VIC 3001.

Step 5 – Sign and date this form

Please provide the people I've listed on this form with information about my Lutheran Super account/s. I understand they will:

- have access to my personal information until I advise Lutheran Super that I wish to end or change this arrangement, but won't be able to alter my account in any way
- need to pass a security check to access my account details, and
- not receive login details to access my account online, and
- understand and consent to my information being collected, disclosed and used in the manner set out in this form.

Signature

Date

Please return your completed form to the Fund Administrator, Lutheran Super, GPO Box 4303, Melbourne VIC 3001.

