



## Investment – Take control of how your super is invested

You can select investment options for your super by calling the Helpline. Once you have received your personal log-in details, you can also select your investment options online at [mercersuper.com](http://mercersuper.com) (sign in using your personal log-in).

**If you don't make an investment selection, you'll automatically be invested in the default investment option which applies to you (please see the 'How we invest your money' section of the PDS for further details).** Your super will remain invested in the default investment option until you make an alternative investment choice and that choice is processed by the trustee.

If you wish to invest in the Mercer Direct investment option, this can only be selected after you have joined your plan and once you have the required minimum amount in your super account balance. You can then choose to invest part of your super in the Mercer Direct investment option online only (using your personal log-in). For further details please read the *Investment Booklet* and *Mercer Direct Member Guide* or call the Helpline.

## Insurance – think about Death and disability cover to protect your family's financial wellbeing

Please refer to the PDS for details about the Death and disability cover arrangements in the Individual Section of the Mercer SmartSuper Plan and how to apply for or adjust your insurance cover.

## Who'll get your super if you die while you're in the Mercer Super Trust?

You can nominate who you would like to receive your Death payout if you die while a member of your plan. Once you have received your personal log-in details, you can also nominate your preferred beneficiaries online at [mercersuper.com](http://mercersuper.com) (sign in using your personal log-in). This is only an indication of your preference for the distribution of your Death payout as the trustee will not be legally bound by your wishes unless you make a binding death beneficiary nomination. For more information about making a binding death benefit nomination, call the Helpline or refer to the *Beneficiaries* fact sheet available at [mercersuper.com/documents](http://mercersuper.com/documents).

Name			
Relationship to you*		Proportion of payout	
Name		Proportion of payout	
Relationship to you*		Proportion of payout	
Name		Proportion of payout	
Relationship to you*		Proportion of payout	
Name		Proportion of payout	
Relationship to you*		Proportion of payout	
Name		Proportion of payout	
Relationship to you*		Proportion of payout	
		Total <b>1 0 0</b> %	

\* must be a dependant or be your legal personal representative (or the executor of your will). Dependant is defined in the **Beneficiaries** Fact sheet.



## Provide your consent to us to search for your other super accounts using your tax file number (TFN)

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. By providing us with consent to use your TFN, you are allowing us to:

- Use your TFN, to search the Australian Tax Office (ATO) for any super monies held by the ATO and any additional super accounts you may have
- Transfer super monies held by the ATO to your Mercer Super account
- Help you to consolidate any additional superannuation accounts found

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.

Signature

X

Date

□□ / □□ / □□□□

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.

## Sign the form

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

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 the Individual Section of the Mercer SmartSuper Plan.
- accept that I will be bound by the provisions of the trust deed and designated rules which govern the operation of my plan and the Mercer Super Trust.
- understand and consent to my information being collected, disclosed and used in the manner set out in the *How Your Super Works Booklet*.
- 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 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.
- acknowledge that I have read and understood the attached PDS and agree to be bound by it. I understand that the PDS contains a number of references to important information set out in a series of booklets (that are part of the PDS) and they should be read before I make a decision about the Individual Section of the Mercer SmartSuper Plan within the Mercer Super Trust.
- understand that all of my super will be invested in the default 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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