

# Application Form – to join your plan in the Mercer Super Trust

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





This Application Form is for members wishing to join the Individual Section of the Mercer SmartSuper Plan by applying for participation in the Mercer Super Trust under the Product Disclosure Statement 1 January 2019 (PDS).

If you have transferred from an employer plan in the Corporate Superannuation Division of the Mercer Super Trust to the Individual Section of the Mercer SmartSuper Plan you are not required to complete this form. However, if you wish to alter any contact details, investment options, insurance cover, or beneficiary details please call the Helpline on 1800 682 525.

#### About this form

We need you to fill out this form to let us know:

- your details
- who you'd prefer to receive your super if you die while you're a member of the Mercer Super Trust.

Once you've finished this form, don't forget to sign it and return it to us at:

Mercer Super Trust GPO Box 4303 Melbourne VIC 3001 If you're unsure of your decisions, we recommend that you see a licensed, or appropriately authorised, financial adviser.

To provide us your Tax File Number, please call the Helpline on **1800 682 525**. Once you have received your personal login details, you can also update your Tax File Number online at **mercersuper.com** (sign in using your personal login).

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1/2019



#### 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 login details, you can also select your investment options online at **mercersuper.com** (sign in using your personal login).

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 futher 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 login). For further details please read the *Investments* booklet and *Mercer Direct Member Guide* or call the Helpline.

Mercer Direct investment option will be available from mid-February 2019.

## 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 login details, you can also nominate your preferred beneficiaries online at mercersuper.com (sign in using your personal login). 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. Name Relationship to you' Name Relationship to you Name Relationship to you' Proportion of payou Relationship to you' Proportion of payout Name Proportion of payout Relationship to you Total



<sup>\*</sup> 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)

	ve can search the Australian Taxation Office (ATO) database using your TFN er superannuation funds. We will advise you of the results and can provide
I give my consent for the Mercer Super Trust or any successor fund ATO or another superannuation provider and to facilitate consolida	to use my TFN to search for other superannuation monies for me from the ation of my accounts.
Signature	Date
X	
The Mercer Super Trust will only use your TFN in accordance with your co contacting the Helpline.	nsent. The consent will remain in place until cancelled by you in writing or by
The Mercer Super Trust requires your TFN and your consent to use your TI cannot search without it.	FN to search the ATO database for other super accounts on your behalf and
If any amounts located from the search process are held by the ATO, in respecial account credits, these balances will be transferred to your account	
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 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	Date
X	



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