

# Suncorp Everyday Super™

## Additional Term Deposit investment form



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Suncorp Portfolio Services Limited (Trustee)  
ABN 61 063 427 958, AFSL 237905, RSE L0002059

### Use this form to make an additional Term Deposit investment into your Suncorp Everyday Super account



#### Important!

There are restrictions on the minimum (\$1,000) and maximum (70% of your account balance) amount you can invest in Everyday Super Term Deposits. Also, you must switch out 100% of your investment in an Everyday Super Term Deposit (you can't partially break it).

#### Tips to help you complete this form

- Use a blue or black pen and write in CAPITAL letters
- Use an 'x' to mark answer boxes
- Complete all sections of the form and sign and date on the last page

**Please note:** You can't make an additional investment into a pension or transition to retirement account using this form. If you'd like to do this, please call us for more information.

#### Have any questions?

If you'd like help completing this form, or if you have any questions, just call us on 1800 191 517. We'll be happy to help.

#### Important information

Please refer to the current Suncorp Everyday Super Product Disclosure Statement (PDS) (including any documents incorporated by reference) for further information before making an additional investment.

### Personal details

Suncorp Everyday Super account number  (if known)

Title

Last name

Given name(s)

Date of birth / /

Daytime phone number  Alternative phone number

Email address

### Tax File Number (TFN) notification

It's important we have your TFN. While providing your TFN is voluntary, you should know that if you don't provide us your TFN, then:

- We can't accept any after-tax (non-concessional) contributions
- It may be difficult to find and rollover (combine) your super in the future and
- You may pay more tax on pre-tax (concessional) contributions than would otherwise be payable.

For more information, please refer to the current Suncorp Everyday Super PDS.

TFN

## Contribution type and amount

Please let us know the contribution type and amount you would like to make.

Personal contribution \$    ,    .

Employer contribution \$    ,    .

Salary sacrifice/additional employer contribution \$    ,    .

Spouse contribution \$    ,    .

**Total contribution amount** \$    ,    .

## Investment allocation of additional investment

Please let us know which investment options you'd like this additional investment to be allocated to.

- I'd like to invest it in line with my future investment strategy (my usual investment options) that I've previously provided you. Don't complete the table below.
- I'd like to invest it differently from my future investment strategy. Please complete the table below.

## Term Deposit investment selection

If you are invested in a Suncorp Lifestage Fund, your additional investment will be automatically invested into that investment option.

For more information on the investment options available within Suncorp Everyday Super, including detailed information on investment restrictions, please refer to the Suncorp Everyday Super PDS.

Investment option	Amount (please fill in EITHER percentage or dollar only)		
Everyday Super Term Deposit – 6 month term*	<input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	Percent to be invested	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> Dollar amount to be invested
Everyday Super Term Deposit – 1 year term*	<input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	Percent to be invested	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> Dollar amount to be invested
Everyday Super Term Deposit – 3 year term*	<input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	Percent to be invested	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> Dollar amount to be invested
Everyday Super Term Deposit – 5 year term*	<input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	Percent to be invested	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> Dollar amount to be invested
Suncorp Australian Shares Fund	<input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	Percent to be invested	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> Dollar amount to be invested
Suncorp International Shares Fund	<input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	Percent to be invested	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> Dollar amount to be invested
Suncorp Property Fund	<input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	Percent to be invested	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> Dollar amount to be invested
Suncorp Australian Fixed Interest Fund	<input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	Percent to be invested	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> Dollar amount to be invested
Suncorp Cash Fund	<input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	Percent to be invested	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> Dollar amount to be invested
Total amount (must equal 100% or total amount of additional contribution)	100%	Percent to be invested	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> Dollar amount to be invested

\* Please note your additional investment will be invested into the Suncorp Cash Fund, prior to being switched into your chosen Everyday Super Term Deposit(s)

## Details of account to be debited – for one-off direct debits only

Please complete this section if you would like Suncorp to debit your Australian financial institution account to make this additional investment only.

Account name

Name of Australian financial institution where account held

Branch name or address

Branch BSB  Account number

## Direct Debit Request authorisation (bank account holder(s) to complete)

- I/We authorise Suncorp Portfolio Services Limited (User ID 252606), to debit/stop debiting my/our account via the Bulk Electronic Clearing System in accordance with the instructions detailed in the Schedule below or in the terms set out on the DDR Service Agreement
- I/We have read and understand the information contained in the DDR Service Agreement
- I'll/We'll notify the Trustee immediately if I'm no longer eligible to contribute
- This section needs to be signed by different people depending on who is making a direct debit contribution
  - Personal contributions - you must sign below
  - Spouse contributions - contributing spouse must sign below
  - Employer contributions - your employer must sign below

All bank account signatories must sign below.

### Account holder A

Full Name

Position in company (employers only)

In the case of a company, two authorised signatories must sign unless a Sole Director and Sole Secretary or Sole Trader

Signature

Date

### Account holder B

Full Name

Position in company (employers only)

In the case of a company, two authorised signatories must sign unless a Sole Director and Sole Secretary or Sole Trader

Signature

Date

## Declaration and signature

By signing this form, I confirm:

- My investment choices have been made after reading the current PDS (including any documents incorporated by reference)
- I acknowledge, when I make any investment decisions or transact on my account, I may have not been notified about material changes or significant events that adversely affect a matter that should be in the PDS for those investment options
- I consent to getting notification and an explanation of any material change or significant event that adversely affects a matter in the most recent Product Guide by downloading the information from your website.
- Before or at the time I provided any personal information, I read and understood the Trustee's privacy statement in the current Suncorp Everyday Super PDS, which is also available at [suncorp.com.au/privacy](https://suncorp.com.au/privacy)
- I consent to the Trustee collecting, using and disclosing my personal information including sensitive information, in accordance with the privacy statement.

Signature

Date / /

Full name

**Please note:**

- The unit prices you'll receive for your request will depend upon the time and day we receive this form – please refer to the current Suncorp Everyday Super Product Guide (which forms part of the PDS)
- You can only cancel the instructions in this form if we receive your cancellation request by 12pm on the same day we receive this form
- We may delay the processing of your request until we receive all funds from an investment manager or if the transaction would adversely affect the interests of other Suncorp Everyday Super account holders
- Where we're directed by a lawful authority to suspend or vary the transaction, we'll comply with that direction

## Where to send the form

Please send the completed form to

Suncorp Everyday Super  
GPO Box 2585  
Brisbane QLD 4001

# Direct Debit Request (DDR) service agreement

This DDR Service Agreement forms part of the terms of the Direct Debit Request (DDR) and should be read in conjunction with this form.

## DDR – Suncorp Everyday Super

You can arrange to pay your superannuation (super) by DDR.

We'll process a direct debit to the account nominated on the DDR for the amount of the super contribution (plus any applicable government charges, GST and processing fees) on the date that it's due.

## Changing your DDR Authority

We'll give you 14 days notice if we change any of the terms of the DDR.

## Deferring, stopping or cancelling your DDR

You may defer, alter, stop or cancel your DDR at any time by providing at least 5 business days notification in writing to any Suncorp Branch

or by mail to:

**Suncorp Everyday Super**  
**GPO Box 2585**  
**Brisbane QLD 4001**

Or contact our Customer Service team on **1800 191 517**

Requests to vary the details of the account to be debited must be in writing and in the terms of the operating authority from the account. Alternatively, you may stop or cancel your DDR at any time by contacting the financial institution where your account to be debited is held.

## DDR dispute resolution

If you wish to dispute a DDR transaction, you can contact the financial institution where your account to be debited is held, or contact us and we'll arrange for your disputed transaction to be investigated and where appropriate, for a correction to be made.

If we're unable to resolve the dispute to your satisfaction, you should contact the financial institution where the account to be debited is held to complete and lodge a DDR Customer Claim Form.

## Non-business days

If your DDR falls due on a weekend or public holiday in Sydney, we'll process it on the next business day. If you're uncertain of the date your DDR will be processed, you should contact your financial institution.

## Returned or dishonoured DDRs

If your DDR is dishonoured or returned unpaid by your financial institution for any reason, we reserve the right to recover the funds from you.

## Clear funds

You should ensure that you have sufficient clear funds in your account to enable the DDR to be paid by your financial institution.

## Your records

We won't disclose any details of your DDR to any person or corporation unless requested to do so by law, or unless the information is required in relation to a disputed transaction.

## Your account

You should be aware that some financial institutions may not allow a DDR to be processed to certain types of accounts. You should check your account details against a recent statement from your financial institution, or check with your financial institution to ensure that a DDR can be processed to your account.

## If you wish to make enquiries about your DDR

You can contact us by emailing [everydaysuper@suncorp.com.au](mailto:everydaysuper@suncorp.com.au) or by writing to:

**Suncorp Everyday Super**  
**GPO Box 2585**  
**Brisbane QLD 4001**

Or contact our Customer Service team on **1800 191 517**