Suncorp Employee Superannuation Plan
Direct Debit Request form (for members)

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

Issued 17 February 2014

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 CAPITAL letters
- Use a cross (✗) to mark answer boxes
- Complete all sections of the form and sign and date on page 2

Any questions? If you'd like help completing this form, or if you have any questions, just call us on 1800 652 489

1. Personal details

Suncorp Employee Superannuation Plan account number

Title

Last name

Given name(s)

Date of birth d d / m m / y y y y

Daytime phone number

Mobile

Email

Providing your tax file number (TFN) is not compulsory. However if you don't 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).

TFN

2. Employer details (your employer to complete – if making employer contributions)

Employer number (if known)

Contact name

Company name

Trading name

Daytime phone number

ABN

3. Direct debit options

Please select one of the following options:

☐ Start a new direct debit – continue to section 4

☐ Change existing direct debit – continue to section 4 (if you're not changing your bank account details, go straight to section 5)

☐ Cancel existing direct debit – continue to section 6

4. Bank account details

Please debit the following account:

Account name

Name of Australian financial institution

Branch name or address

Branch BSB – Account number

5. Amount to be debited

Deduction frequency

☐ Monthly ☐ Quarterly ☐ Half-yearly ☐ Yearly

Amount and contribution type

Please indicate the type and amount of the contribution per period.

Employee/Personal contributions $	Spouse contributions $

or

Employer contributions			Total employer contributions $
Award/SG $	Salary sacrifice $	Employer additional $	

Direct debit date

Your account will be debited on or around the 1st of the month.

Start date 0 1 / m m / y y y y

Contributions will be invested according to your current investment strategy.

6. 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 on 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

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 d d / m m / y y y y

Account holder B

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 d d / m m / y y y y

Please send the completed form to:

Suncorp Employee Superannuation Plan
GPO Box 2585 (IPC: LS004)
Brisbane QLD 4001

7. 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 Employee Superannuation Plan

You can arrange to pay your superannuation by DDR.

We'll process a direct debit to the account nominated on the DDR for the amount of the superannuation 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 five business days' notification **in writing** to any Suncorp Branch or by mail to:

Suncorp Employee Superannuation Plan
GPO Box 2585 (IPC: LS004)
Brisbane QLD 4001

Or contact our Customer Service team on **1800 652 489**

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 as follows and we'll arrange for your disputed transaction to be investigated and where appropriate, for a correction to be made.

Suncorp Employee Superannuation Plan
GPO Box 2585 (IPC: LS004)
Brisbane QLD 4001

staff.super@suncorp.com.au

Or contact our Customer Service team on **1800 652 489**

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 and charge any additional fee that may apply.

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 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 writing to:

Suncorp Employee Superannuation Plan
GPO Box 2585 (IPC: LS004)
Brisbane QLD 4001

staff.super@suncorp.com.au

Or contact our Customer Service team on **1800 652 489**