Suncorp WealthSmart®
Change of adviser fees form

Issued 1 August 2012

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

Please use this form to let us know you've agreed to change your existing fee arrangements with your current financial adviser

Please note: If you're an **employed member of a Suncorp WealthSmart Business Super employer plan**, your employer agrees the ongoing fees applying to your super account with your adviser. You can't change these fees.

Tips to help you complete this form

- Use blue or black pen and CAPITAL letters
- Use a cross (✗) to mark answer boxes

Any questions? If you'd like help completing this form, or if you have any questions, just call us on 13 11 55 and ask for 'Super'

1. Personal details

Suncorp WealthSmart member number

Title

Last name

Given name(s)

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

Daytime phone number

Mobile

Email

2. Adviser details

Suncorp WealthSmart adviser ID

Last name

Given name(s)

Company name

Licensee name

Address

Suburb/Town

State

Postcode

Daytime phone number

Mobile

Email

✗

3. Adviser remuneration details

Please specify the fees that apply to your account. **If you do not make any change to a particular fee, the current fee will continue to apply.**

Contribution fee*

☐ Max or ___. ___ % pa (0% pa – 4.0% pa max)

Transfer fee*

☐ Max or ___. ___ % pa (0% pa – 4.0% pa max)

Ongoing service fee* – Suncorp Bank Deposit Fund and Suncorp Term Deposit Fund

☐ Max or ___. ___ % pa (0% pa – 0.545% pa max)

Ongoing service fee* – All other investment options

☐ Max or ___. ___ % pa (0% pa – 0.545% pa max)

Insurance premium commission fee*

☐ Max or ___. ___ % pa (0% pa – 25.0% pa max)

* These are the GST exclusive fees which will be deducted from your account. GST is then added to the remuneration paid to your adviser, which is not an additional cost to you. In some circumstances, the 0.545% pa max quoted for ongoing service fee includes a portion of the admin fee.

Optional adviser service fee

This can either be a fixed monthly dollar amount or percentage of your account balance.

Percentage **Fixed monthly dollar amount**

___. ___ % **pa** or **$** ___, ___. ___

Or it can be a one-off dollar amount.

Upfront dollar amount $ ___, ___. ___

GST on the optional adviser service fee is included in the amounts stated above.

4. Adviser declaration and signature

I confirm the remuneration details provided on this form are true and correct and have been agreed with the member.

Adviser's signature ✗ Date d d / m m / y y y y

5. Member declaration and signature

I confirm the remuneration details provided on this form are true and correct and have been agreed with my financial adviser.

Signature ✗

Date d d / m m / y y y y

Full name

Please send the completed form to:

Suncorp WealthSmart®
GPO Box 2585
Brisbane QLD 4001

Or fax to: **1300 172 693**