

Advice fee form

Issued 1 January 2014

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



Use this form to authorise the Trustee to pay an advice fee to your financial adviser (agreed by the Trustee) and have the fee charged to your Everyday Super account.

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

Have any questions?

If you'd like help completing this form, or if you have any questions, just call us on 1800 191 517 between 8am and 6pm (Eastern Standard Time) Monday to Friday. We'll be happy to help.

Personal details

Suncorp Everyday Super account number (if known)

Title

Last name

Given name(s)

Date of birth / /

Your adviser details

Adviser ID

Last name

Given name(s)

Company name

Licensee name

Street name and number or PO Box number

Suburb/Town

State Postcode

Daytime phone number Alternative phone number

Email address

Personal advice fee[^]

Suncorp Lifestage Fund

Upfront dollar amount

\$, .

or

Percentage

. % of account balance

Other investment options

Upfront dollar amount

\$, .

or

Percentage

. % of account balance

The personal fee for the Suncorp Lifestage Fund and for all other investment options can only be charged as a one-off advice fee payment.

GST on the personal advice fee is included in the amounts stated above. Any personal advice fee will be deducted from your Suncorp Lifestage Fund or proportionately across all your investment options, excluding Suncorp Everyday Super Term Deposits.

The trustee may at its absolute discretion refuse to deduct a personal advice fee or any other fee.

Personal advice fees will appear as an advice fee on transaction statements and annual statements.

[^]Effective 1 January 2014 the name personal advice fee replaces adviser service fee on Suncorp Everyday Super accounts.

Declaration and signature

I confirm the information I've provided on this form is true and correct and I agree to this amount being charged to my Suncorp Everyday Super account.

Signature

Date / /

Full name

Where to send the form

Please send the completed form to

Suncorp Everyday Super
GPO Box 2585
Brisbane QLD 4001