

## Personal Advice Fee Form

Issued 1 July 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.**



This form allows a member and a financial adviser to request changes to a personal advice fee. If you have any questions about how to complete this form, speak to your financial adviser.

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

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

#### One-off Fee

##### Dollar amount

\$   ,     .

or

##### Percentage

.   % of account balance

### Other investment options

#### One-off Fee

##### Dollar amount

\$   ,     .

or

##### Percentage

.   % of account balance

### Important information

- The personal advice fee for the Suncorp Lifestage Fund and for all other investment options can only be charged as a one-off payment.
- Any personal advice fee will be deducted from your Suncorp Lifestage Fund or proportionately across all your other 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.
- GST on the personal advice fee is included in the amounts stated above.

### Financial adviser declaration

I acknowledge and declare that:

- I have disclosed to my client all information relating to the Personal Advice Fee and agreed with my client to the Personal Advice Fee above.
- I confirm that the changes I have made are only related to the services I provide for Suncorp Everyday Super. I request the Trustee to complete the changes outlined above.

## Member declaration and signature

### Member declaration

I acknowledge and declare that:

- 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.
- I have read and understood the relevant information provided in my Product Disclosure Statement and Product Guide relating to the personal advice fee.
- I have agreed with my financial adviser to the personal advice fee outlined above and request the Trustee to complete the changes requested.
- I confirm that the changes I have made only relate to the services my financial adviser provides for 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