

# Suncorp Superannuation

## Personal Advice fee form



Issued 27 May 2017

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 and have the fee charged to your account**

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

**Please note:** If you're an employed member of a Suncorp 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 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 have any questions about how to complete this form, speak to your financial adviser or call us between 8am and 6pm (Eastern Standard Time) Monday to Friday.

## Personal details

Account number*	<input type="text"/>
Title*	<input type="text"/>
Last name*	<input type="text"/>
Given name(s)*	<input type="text"/>
Date of birth*	<input type="text" value="dd/mm/yyyy"/>
Mobile phone number*	<input type="text"/>
Email address*	<input type="text"/>

## Your adviser details

Adviser ID	<input type="text"/>
Last name*	<input type="text"/>
Given name(s)*	<input type="text"/>
Company name*	<input type="text"/>
Licensee name*	<input type="text"/>
Street name and number or PO Box number	<input type="text"/>
Suburb/Town	<input type="text"/>
State	<input type="text"/>
Postcode	<input type="text"/>
Daytime phone number	<input type="text"/>
Mobile phone number*	<input type="text"/>
Email address*	<input type="text"/>

\*mandatory field

## Personal advice fee

This section allows a member and a financial adviser to change a personal advice fee. If you have any questions about how to complete this section, speak to your financial adviser. By completing this section you authorise the Trustee to pay a personal advice fee to your financial adviser (agreed by the Trustee) and have the fee charged to your Suncorp Superannuation account.

Personal advice fees can be payable as:

- A one-off fixed dollar fee.
- An ongoing fixed monthly dollar fee.
- An ongoing percentage of your account balance up to a maximum of 2% pa, deducted from your account effective on or around the last day of the month (or earlier, if you leave Suncorp Superannuation part way through a month).
- Any personal advice fees that relate to investment options other than the Suncorp Lifestage Fund cannot be deducted from the Suncorp Lifestage Fund.

### One-off Fee

Dollar amount

\$   ,     .

### Ongoing Fee

Dollar amount

\$   ,     .   per month or  .   % of account balance (max 2% p.a.)

Percentage

### Important information

- Any personal advice fee will be deducted from your account.
- GST on the personal advice fee is included in the amounts stated above.
- The Trustee may at its absolute discretion refuse to deduct the personal advice fee.
- You can cancel an ongoing personal advice fee at any time.

## 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 Superannuation. I request the Trustee to complete the changes outlined above.

Adviser's signature

Date   /   /

## Member declaration and signature

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 superannuation or pension 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 superannuation or pension account.

Signature

Date

/   /

Full name

## Where to send the form

Please send the completed form to:



Suncorp Super  
GPO Box 2585  
Brisbane QLD 4001 Australia



super@suncorp.com.au