

# Suncorp WealthSmart® Personal Super Application Form



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

Issued 10 March 2015

Adviser ID

Use this form if you're opening a Suncorp WealthSmart Personal Super account.

### Tips to help you complete this form

- Use blue or black pen and BLOCK letters
- Use a cross (X) to mark answer boxes
- Complete all of the form and sign and date on the last page

**Any questions?** If you'd like help completing this form, or if you have any questions, just call us on 13 11 55 between 8am and 6pm (Eastern Standard Time) Monday to Friday.

Financial advisers can email completed and signed application forms to [adviser\\_wealthsmartapps@suncorp.com.au](mailto:adviser_wealthsmartapps@suncorp.com.au)

## 1. Personal details

Title

Last name

Given name(s)

Date of birth / /  Gender: Male  Female

Occupation

## 2. Contact details

Please transfer the information from my existing Suncorp WealthSmart account:

I'm a new customer or some of my details have changed, I've provided the updated information below.

**Residential address** (sorry – we can't accept PO Boxes)

Street address

Suburb/Town

State  Postcode

Daytime phone number  Mobile

Email

**Postal address** (if different from above)

Street address/  
 PO Box

Suburb/Town

State  Postcode

## 3. Tax File Number (TFN) notification

Please read the section 'Tax File Numbers (TFN)' in the Product Guide for further information on providing your TFN.

TFN  or

Reason for exemption

#### 4. Investment selection

Make your investment choice by selecting from the following investment options. You may select a maximum of 20 investment options at any time.  
**If your investment selection is incomplete or unclear, your contributions will not be accepted.**

Please refer to the investment information in the Suncorp WealthSmart Personal Super and Pension Product Disclosures Statement (PDS) and Product Guide before selecting an investment option. For some investment options, a PDS is issued by the underlying manager, free of charge. You can download copies from our website or ask us for a printed version. Before you make an investment choice you should consider the relevant investment manager's PDS.

Is your initial investment selection the same as your future investment strategy?

Yes, complete column A only  No, complete both column A and B

##### Investment option

###### Suncorp WealthSmart Term Deposits

- Suncorp WealthSmart Term Deposit 6 month term.....
- Suncorp WealthSmart Term Deposit 1 year term.....
- Suncorp WealthSmart Term Deposit 3 year term.....
- Suncorp WealthSmart Term Deposit 5 year term.....

###### Diversified investment options

- Suncorp Lifestage Fund.....

###### Secure

- Suncorp Secure Portfolio.....

###### Conservative

- Suncorp Conservative Portfolio.....
- Suncorp Universal Conservative Fund.....

###### Balanced

- Suncorp Balanced Portfolio.....
- Suncorp Universal Balanced Fund.....

###### Growth

- Suncorp Growth Portfolio.....
- Suncorp Universal Growth Fund.....

###### High growth

- Suncorp High Growth Portfolio.....

###### Single sector investment options

###### Cash

- Suncorp Cash Fund.....
- Suncorp Guaranteed Cash Fund.....

###### Australian fixed interest

- Nikko AM Australian Bond Fund.....
- Vanguard® Australian Fixed Interest Index Fund.....

###### International fixed interest

- Vanguard® International Fixed Interest Index Fund (Hedged).....

###### Diversified fixed interest

- Macquarie Diversified Fixed Interest Fund.....

###### Diversified income

- Colonial First State Global Credit Income Fund.....

###### Australian property

- Ironbark Paladin Property Securities Fund.....
- Vanguard® Australian Securities Index Fund.....

###### International property

- Vanguard® International Property Securities Index Fund (Hedged).....

###### Australian shares

- Ausbil Australian Active Equity Fund.....
- BT Wholesale Imputation Fund.....
- Fidelity Australian Equities Fund.....
- Hyperion Australian Growth Companies Fund.....
- Ibbotson Australian Shares Active Trust.....
- Investors Mutual Industrial Share Fund.....
- Ironbark Karara Australian Share Fund.....
- Nikko AM-Tyndall Australian Share Wholesale Portfolio.....
- Perennial Growth Shares Wholesale Trust.....
- Perpetual Wholesale Industrial Fund.....
- Perpetual Wholesale SHARE-PLUS Long-Short Fund.....
- Suncorp Australian Shares Fund.....
- Vanguard® Australian Shares Index Fund.....

###### Australian shares – specialist

- Ausbil Australian Emerging Leaders Fund.....
- Nikko AM-Tyndall Australian Share Income Fund.....
- Perpetual Wholesale Ethical SRI Fund.....
- Perpetual Wholesale Geared Australian Fund.....
- Zurich Investments Equity Income Fund.....

###### International shares

- Grant Samuel Epoch Global Equity Shareholder Yield (Unhedged) Fund.....
- Platinum International Fund.....
- Suncorp Global Shares Fund.....
- Vanguard® International Shares Index Fund.....
- Walter Scott Global Equity Fund.....

###### International shares – specialist

- BlackRock Global Allocation Fund.....
- Colonial First State Global Resources Fund.....
- Lazard Global Small Cap Fund.....

###### Infrastructure

- Lazard Global Infrastructure Securities Fund.....

###### Closed investment options\*

###### Diversified investment options

###### Secure

- Suncorp Traditional Capital Guaranteed Fund.....

##### A Initial Investment Selection

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##### B Future Investment Strategy

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<b>Conservative</b> Suncorp Traditional Conservative Fund.....	_____ %	_____ %
<b>Balanced</b> Suncorp Traditional Balanced Fund.....	_____ %	_____ %
<b>Growth</b> Suncorp Traditional Growth Fund.....	_____ %	_____ %
<b>High growth</b> Suncorp Traditional High Growth Fund.....	_____ %	_____ %
* Only available to members currently invested in these options.	<b>Total</b>	1 0 0 %
		1 0 0 %

**5. Initial contribution details**

My initial contribution is:

by cheque  
Please make cheques payable to 'Suncorp Portfolio Services Limited' with your account name and number on the back of the cheque

My contribution is made up of:

Personal contribution \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_ . [C][C] (refer to **Important information** below)  
Employer contribution \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_ . [C][C]  
Spouse contribution \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_ . [C][C]  
**Total by cheque contribution** \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_ . [C][C]

and/or

I would like to transfer my super fund into my Suncorp WealthSmart account. Please complete the section below for each fund including a transfer from an existing Suncorp WealthSmart account. If neither a Full or Partial transfer is selected, a Full transfer will be processed.

**You can find detail to complete this section on a previous fund statement.**

**Fund 1**

Fund name\* \_\_\_\_\_  
Your account or member number\* \_\_\_\_\_  Full or  Partial \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_  
Unique superannuation identifier (USI)^ \_\_\_\_\_

**Fund 2**

Fund name\* \_\_\_\_\_  
Your account or member number\* \_\_\_\_\_  Full or  Partial \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_  
Unique superannuation identifier (USI)^ \_\_\_\_\_

**Fund 3**

Fund name\* \_\_\_\_\_  
Your account or member number\* \_\_\_\_\_  Full or  Partial \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_  
Unique superannuation identifier (USI)^ \_\_\_\_\_

**Fund 4**

Fund name\* \_\_\_\_\_  
Your account or member number\* \_\_\_\_\_  Full or  Partial \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_  
Unique superannuation identifier (USI)^ \_\_\_\_\_

**Fund 5**

Fund name\* \_\_\_\_\_  
Your account or member number\* \_\_\_\_\_  Full or  Partial \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_  
Unique superannuation identifier (USI)^ \_\_\_\_\_

\*mandatory field

^A USI is a form of unique identification for a superannuation fund's products. You may be able to locate the USI on a previous fund statement. If you'd like assistance in consolidating more than five funds, please copy this page and attach to this form.

**Important information**

• **Did you know** that you may be able to claim a tax deduction for personal contributions made to your previous super provider? To do this, you'll need to complete and provide a **s290-170 Notice of intent to claim a tax deduction form** to your previous super provider, before you submit a rollover request to us.

Please specify the amount of contributions you intend to claim as a tax deduction for the current financial year.

Nil                       Full amount  
 Partial amount \$ \_\_\_\_\_ (specify amount)

**Contributions claimed are subject to contributions tax.**

**6. Auto-rebalancing**

Please refer to the Product Guide for further information about this option.

I don't wish to use this service.

I'd like to have my account rebalanced:                   Quarterly                   Half-yearly                   Yearly

Your investments will be rebalanced in line with your future investment strategy.

**7. Regular contribution plan**

If you wish to regularly contribute to your account, please complete a Direct Debit Request form and attach to this application. Please note, a minimum of \$100 per month applies to your regular contribution plan.

**8. Account linking**

Please link my account with my family members in Suncorp WealthSmart as listed below (for fee discount purposes only). Please photocopy this form if you wish to add further accounts for linking.

Group name \_\_\_\_\_

(This is the name you want or have given to the group of linked accounts, eg The John Jones family.)

Account number _____ -----	Last name _____ -----
----------------------------------	-----------------------------

Given name(s) _____
------------------------

I consent to having my account linked

X
---

Family member's signature

Account number _____ -----	Last name _____ -----
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Given name(s) _____
------------------------

I consent to having my account linked

X
---

Family member's signature

**9. Please tell us how you'd like to receive communication from us**

**Annual statements and other important communications (eg confirmations of transactions and changes to your account).**

Email me when it's available and I'll get it from your website at [suncorp.com.au](http://suncorp.com.au) (Please ensure you have provided your email address in section 2.)  
 I'd like it sent to me by post

**Annual reports**

I'll get it from your website at [suncorp.com.au](http://suncorp.com.au)  
 I'd like it sent to me by post

**10. Application for insurance cover**

If you're age 55 or over or you're applying for Income Protection and/or total cover greater than \$1,000,000 for Death only or Death and TPD (including any existing cover), please **DO NOT** complete this section. Instead, download and complete the insurance application form which is available from our website at [suncorp.com.au](http://suncorp.com.au), sign and attach with this application. Your adviser can assist you with these details.

**Death only**                  Amount of cover  
(in addition to any existing cover) \$ \_\_\_\_\_

or

**Death and TPD**                  Amount of Death cover  
(in addition to any existing cover) \$ \_\_\_\_\_  
Amount of TPD cover  
(in addition to any existing cover) \$ \_\_\_\_\_

**Note: When applying for Death and TPD, the TPD cover amount cannot exceed the Death cover amount.**

## Your duty of disclosure

### To be read by the Insured Person before completing the application.

Before you enter into a contract of life insurance with an insurer, you have a duty, under the Insurance Contracts Act 1984, to disclose to the insurer every matter that you know, or could reasonably be expected to know, is relevant to the insurer's decision whether to accept the risk of the insurance and, if so, on what terms.

Your duty, however, doesn't require disclosure of a matter

- that diminishes the risk to be undertaken by the insurer
- that is of common knowledge
- that your insurer knows, or in the ordinary course of their business, ought to know
- as to which compliance with your duty is waived by the insurer.

**Non-disclosure** – If you fail to comply with your duty of disclosure and the insurer would not have entered into the contract on any terms if the failure had not occurred, the insurer may avoid the contract within three years of entering into it. If your non-disclosure is fraudulent, the insurer may avoid the contract at any time.

An insurer who is entitled to avoid a contract of life insurance may, within three years of entering into it, elect not to avoid it but to reduce the sum that you have been insured for in accordance with a formula that takes into account the insurance fee that would have been payable if you had disclosed all relevant matters to the insurer.

**This duty continues to apply until the insurer notifies you that the risk has been accepted. It also applies when you extend, vary or reinstate a contract of life insurance.**

## Occupation details

Industry in which you're employed

Occupation category (your adviser can assist with this)

- Professional
- White Collar
- Light Blue/Grey Collar
- Skilled Blue Collar
- Heavy Blue Collar
- Hazardous

Hours worked per week

Basis of employment:  Permanent  Casual  Contract

### Self-employed

What has been your insurable income over the past 12 months? Insurable income is the income earned by your own personal exertion (less expenses incurred in earning that income) before tax, which will cease if you're unable to work. \$

### Employees

What has been your annual salary over the past 12 months? \$

## All applicants

Have you or any business with which you have been associated ever been made bankrupt or placed in receivership, involuntary liquidation or under administration?

If 'yes', please provide details.

Date declared bankrupt / /  Date of Discharge / /

Original amount owed \$

## Short personal health statement

Please provide the following details:

Height \_\_\_\_\_ cm or \_\_\_\_\_ feet/inches

Weight \_\_\_\_\_ kg or \_\_\_\_\_ stone/pounds

Have you smoked tobacco or any other substance in the last 12 months? .....  Yes  No

### Important information

**If you answer "Yes" to any of the questions in the short personal health statement below, please DO NOT continue completing this section. Instead, please download and complete the insurance application form, sign and attach with this application. This form is available from our website at [suncorp.com.au](http://suncorp.com.au) Your adviser can assist you with these details.**

1. Do you engage in any hazardous activities, pursuits or occupational duties, such as but not limited to motorised sports, scuba diving below 40 metres or aviation (other than as a fare paying passenger on a licensed public service (eg Qantas))? .....  Yes  No
2. Do you have any definite plans to travel or reside overseas in the future? (Holidays less than 4 weeks don't need to be disclosed) .....  Yes  No
3. Have you ever suffered symptoms of, or had, or been told you have, or received or are contemplating any advice or treatment for:
  - i) Muscular skeletal disorders (eg back, joint), arthritis, loss of limb or paralysis .....  Yes  No
  - ii) Impairment of sight or hearing (not including long or short sightedness) .....  Yes  No
  - iii) Mental or nervous disorder including stress, anxiety, depression or neurological condition .....  Yes  No
  - iv) Cancer or tumour of any type .....  Yes  No
  - v) Diabetes or liver disease including hepatitis .....  Yes  No
  - vi) High blood pressure, high cholesterol, chest pain, heart complaint or stroke .....  Yes  No
  - vii) Disorders and or disease of the kidney, bladder, bowel or stomach? .....  Yes  No
4. Have you ever:
  - i) Suffered from AIDS or been infected with the HIV virus, or .....  Yes  No
  - ii) Used intravenous drugs or had sexual activity with someone you know or suspect to be HIV positive, or .....  Yes  No
  - iii) Engaged in male to male anal sexual activity? .....  Yes  No
5. To the best of your knowledge, have two or more members of your immediate family, i.e. parents, brothers or sisters (living or deceased) suffered from any hereditary disease before age 60? .....  Yes  No
6. Does your alcohol consumption exceed more than 20 standard drinks per week? .....  Yes  No

## 11. Non-lapsing death benefit nomination

Please refer to the Product Guide for more information on beneficiaries.

I don't wish to nominate a beneficiary or  In the event of my death, I direct you to pay my benefit to my dependants as listed below.

If you wish to nominate more than three dependants, please copy this page and attach to this form. The total of all allocated proportions (both your dependants and estate) must equal 100%.

Last name	<input type="text"/>	
Given name(s)	<input type="text"/>	
Date of birth	<input type="text"/>	
Relationship to you	<input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Financial dependant <input type="checkbox"/> Interdependent relationship	
Is a child pension required?	<input type="checkbox"/> Yes* <input type="checkbox"/> No	<input type="text"/> %
<hr/>		
Last name	<input type="text"/>	
Given name(s)	<input type="text"/>	
Date of birth	<input type="text"/>	
Relationship to you	<input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Financial dependant <input type="checkbox"/> Interdependent relationship	
Is a child pension required?	<input type="checkbox"/> Yes* <input type="checkbox"/> No	<input type="text"/> %
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Last name	<input type="text"/>	
Given name(s)	<input type="text"/>	
Date of birth	<input type="text"/>	
Relationship to you	<input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Financial dependant <input type="checkbox"/> Interdependent relationship	
Is a child pension required?	<input type="checkbox"/> Yes* <input type="checkbox"/> No	<input type="text"/> %
<hr/>		
<b>And/or</b>		
<input type="checkbox"/> Please pay my benefit to my estate		<input type="text"/> %
<b>Total allocation</b>		<b><input type="text"/> 1 <input type="text"/> 0 <input type="text"/> 0 %</b>

Unless a child pension has been specified, your death benefit will be paid in a form determined by the Trustee after your death and having consulted your beneficiaries.

\* Where one or more child pensions are specified, please also complete a child pension form which you can get at [suncorp.com.au](http://suncorp.com.au)

### Member's declaration

I request that the Trustee accepts my nomination. I understand that:

- On my death, the Trustee must pay my death benefit in accordance with my nomination, provided it's valid at that time.
- For my nomination to be valid, the beneficiaries I've nominated must be dependants at the time of my death, or my estate.
- My beneficiaries and I agree to be bound by the Fund's Trust Deed (as amended).
- This nomination applies to my superannuation death benefit in this Suncorp WealthSmart account.
- If a nomination is invalid at the time of my death, the Trustee has discretion to determine the beneficiaries, including any payment to my estate.

Signature  Date

Signed in the presence of the witness below.

**Witness declaration** (The date of witness and member signatures must be the same.)

#### First witness signature

I declare that:

- I'm over 18 years of age and I'm not a nominated beneficiary and
- this nomination was signed by the member in my presence.

Signature  Date

Please print name

#### Second witness signature

I declare that:

- I'm over 18 years of age and I'm not a nominated beneficiary and
- this nomination was signed by the member in my presence.

Signature  Date

Please print name

**As we're bound to pay your benefit according to your valid nomination, we recommend you review your nomination if any of your circumstances change. You can change your nomination at any time by completing a new non-lapsing death benefit nomination form.**





## 16. Authorised third-party's personal details

### Important information

You can give someone (either a person or an entity, like a company) the legal authority to make changes to your account. We call them 'authorised third-parties'.

### Things your authorised third-party can do

They can do everything you can do with your account to the extent permitted by law (except for the things mentioned below). Eg they can:

- make additional contributions
- request a withdrawal of your benefit (subject to preservation rules)
- request a transfer of your benefits to another superannuation fund
- request information about your account and copies of any documents provided by us in relation to it.

### Things your authorised third-party can't do

They can't:

- request a cheque to be paid to someone other than you. This means any withdrawal requests will only be paid to you or to the bank account previously nominated by you. We can only pay to a bank account in your name or a joint bank account of which you're one of the account holders
- change your address
- appoint other authorised third-parties
- (where they're your adviser) change any fees or charges or alter bank account details for withdrawals.

### Authorities if your authorised third-party is an entity (eg a company).

- If it's a company, this authority extends to any of its directors or authorised officers
- If it's a partnership, this authority extends to all its partners.

I'd like to appoint the following person as my authorised third-party:

If your authorised third-party is a person:

Title

Last name

Given name(s)

Date of birth  /  /

If your authorised third-party is an entity (eg a company)

Entity name

Contact person

ABN (if a company)

---

Street address

Suburb/Town

State  Postcode

Daytime phone number           Mobile

Email

## 17. Authorised third-party's signature and acceptance

I accept this appointment and agree to all its terms and conditions as set out in this form, disclosure documents (such as Suncorp WealthSmart's current Product Disclosure Statement), trust deed and other governing rules of the Suncorp Master Trust.

Authorised third-party signature

Date

/  /

## 18. Declaration and signature

By completing and signing this form:

### General

- I've read the Suncorp WealthSmart Personal Super & Pension PDS and Product Guide and have received and accepted this offer in Australia. If I've received this offer electronically, I've printed all pages of the document.
- I agree to be bound by the Trust Deed for the Suncorp Master Trust, as amended from time to time.
- I agree to the fees shown in section 12.
- I understand the Trustee reserves the right to refuse or reject an application.
- If my application is incomplete or unclear, you may hold my money for up to 30 days. If you don't receive additional information or a completed application form within this timeframe, you'll return the money to whoever paid it to you without any interest.

### Contributions and withdrawals

- I understand that I can't receive a benefit payment from Suncorp WealthSmart Personal Super unless I've satisfied a condition of release as set out in the Product Guide.
- I've read the eligibility criteria to make a contribution into superannuation and I'm eligible to make or have contributions made on my behalf.

### Investments

- I acknowledge that the performance of any investment option offered by Suncorp WealthSmart isn't guaranteed by the Trustee or any other person, unless otherwise stated.
- I understand for some investment options, one or more PDSs for the financial products underlying that option are available at [suncorp.com.au](http://suncorp.com.au) or by contacting you, and I consent to getting these PDSs by downloading them from this website or asking you for a printed version.
- My investment choices have been made after reading the current Suncorp WealthSmart Personal Super & Pension PDS and Product Guide, and the underlying investment manager's PDS for each investment option.
- I acknowledge, when I make any investment decisions or transact on my account, I may not have read the most recent investment manager's PDS for each investment option and may not have been notified about material changes or significant events that adversely affect a matter that should be in the PDS for those investment options.
- I consent to getting notification and an explanation of any material change or significant event that adversely affects a matter in the most recent PDS(s) for the underlying financial product(s) for each investment option by downloading the information at [suncorp.com.au](http://suncorp.com.au)

### Authorised third-party

If I've nominated an authorised third-party:

- I acknowledge the exercise of any of the powers by a person reasonably believed by the Trustee or its service providers to be my authorised third-party or to be acting on behalf of my authorised third-party, will be treated as if I had personally exercised those powers.
- I acknowledge this arrangement will continue until I cancel the appointment in writing.
- I agree the Trustee may cancel this facility or vary these conditions after giving me 14 days notice in writing.
- I agree to release, discharge and indemnify the Trustee, other members of the Suncorp Group and its service providers from and against any claims, liabilities and expenses arising out of or in relation to my authorised third-party.
- I agree if I appoint an authorised third-party I can't later claim that my authorised third-party, or any person(s) appointed by me acting on behalf of my authorised third-party, was not acting on my behalf.

### Information, authorisation of other persons and privacy

- I authorise my adviser, and any other person who I inform you in writing, to receive and obtain my personal information for the purposes of managing my account and I'll notify you if there is a change to this arrangement.
- Before or at the time I provided any personal information, I have read and understood your privacy statement in the current Suncorp WealthSmart Product Guide, which is also available at [suncorp.com.au/privacy](http://suncorp.com.au/privacy)
- I consent to you collecting, using and disclosing my personal information including sensitive information, in accordance with the privacy statement, including for the purposes of opening and administering my Suncorp WealthSmart Personal Super account.
- I agree to be contacted by phone by a Suncorp representative if there is a need to get more information from me.
- The information I've provided on the application form is true and correct.

### Meanings

- In this section 18, all references to 'you' are to the Trustee.

### Marketing

- Every now and then, we and any related companies that use the Suncorp brand might let you know about news, special offers, products and services that you might be interested in. We will engage in marketing unless you tell us otherwise. You can contact us to update your marketing preferences at any time.

### Meanings

- All references to 'we' are to the Trustee.

Applicant's signature

X

Date / /

Please send the completed form and any required attachments to:

**Suncorp WealthSmart®**  
**GPO Box 2585**  
**Brisbane QLD 4001**

## Medical history authorisation by the Person to be Insured

(Must be completed)

### To Doctor

I authorise any doctor, hospital, clinic and other medical or related facility, or any other person who has attended me, to provide Suncorp Life & Superannuation with any information with respect to any sickness, injury, consultation, tests (including genetic test(s)), prescriptions or treatment and copies of all hospital records.

I authorise the Medicare Australia to release to Suncorp Life & Superannuation Limited, at their request, a copy of my medical history records.

I agree that a photocopy or facsimile of this authority should be considered as effective and valid as the original.

Name of Person(s) to be insured

Maiden name (if applicable)

Signature

Date

Signature of Person to be Insured