

# Suncorp Brighter Super® and Suncorp Employee Superannuation Plan Additional Investment Form

Use this form to make an additional investment into your Suncorp Brighter Super® or Suncorp Employee Superannuation account, using a different investment strategy to what is currently applied to your 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

**Please note:** You can't make an additional investment into a pension or transition to retirement account using this form. If you'd like to do this, please call us for more information.

## Have any questions?

If you'd like help completing this form or if you have any questions, just call us between 9am and 5pm (Eastern Standard Time) Monday to Friday.

Suncorp Brighter Super 13 11 55

Suncorp Employee Superannuation Plan 1800 652 489

## Important information

Please refer to the applicable Suncorp Superannuation Product Disclosure Statement (PDS) (including any documents incorporated by reference) for further information before making an additional investment.

## Personal Details

Account number	<input type="text"/>		
Title	<input type="text"/>		
Given name	<input type="text"/>		
Surname	<input type="text"/>		
Date of birth	<input type="text" value="DD / MM / YYYY"/>		
Daytime phone	<input type="text"/>	Mobile phone	<input type="text"/>
Email address	<input type="text"/>		

## Tax File Number (TFN) Notification

It's important we have your TFN. While providing your TFN is voluntary, you should know that if you don't provide us your TFN, then:

- We can't accept any after-tax (non-concessional) contributions
- It may be difficult to find and rollover (combine) your super in the future and
- You may pay more tax on pre-tax (concessional) contributions than would otherwise be payable.

If you haven't already provided us with your TFN, you can complete the Tax File Number section below in this form.

## Contribution Type and Amount

Please let us know the contribution type and amount you would like to make. Information on contribution types can be found in the applicable Suncorp Superannuation Product Guide.

Personal contribution	<input type="text"/>
Employer contribution	<input type="text"/>
Salary sacrifice/additional employer contribution	<input type="text"/>
Spouse contribution	<input type="text"/>
<b>Total contribution</b>	<input type="text"/>

## Investment Instructions

Please let us know which investment options you'd like this additional investment to be allocated to. If you are invested solely in a Suncorp Lifestage Fund, your additional investment will be automatically invested into that investment option.

- I'd like to invest it in line with my existing investment strategy (my future investment options) that I've previously provided you, and understand I do NOT need to complete the table below.
- I'd like to invest it differently from my existing investment strategy and have completed the table below.

## Investment Selection

If you are invested solely in a Suncorp Lifestage Fund, your additional investment will be automatically invested into that investment option. For more information on the investment options, including detailed information on investment restrictions, please refer to the applicable Suncorp Superannuation PDS.

INVESTMENT OPTION	AMOUNT (Please Fill in EITHER Percentage or Dollar Only)	
	A Percent to be Invested	B Dollar Amount to be Invested
<b>Suncorp Lifestage Funds</b>		
Suncorp Lifestage Fund (Life)	%	\$
<b>Conservative</b>		
Morningstar Conservative Fund (Mor Con)	%	\$
Suncorp Multi-Manager Conservative Fund (Sun MM Con)	%	\$
<b>Moderate</b>		
Morningstar Moderate Fund (Mor Mod)	%	\$
<b>Balanced</b>		
Morningstar Balanced Fund (Mor Bal)	%	\$
Suncorp Multi-Manager Balanced Fund (Sun MM Bal)	%	\$
<b>Growth</b>		
Morningstar Growth Fund (Mor Growth)	%	\$
Suncorp Multi-Manager Growth Fund (Sun MM Gth)	%	\$
<b>High Growth</b>		
Morningstar High Growth Fund (Mor Growth)	%	\$
Suncorp Multi-Manager High Growth Fund (Sun MM Hig)	%	\$
<b>Cash</b>		
Suncorp Cash Fund (Sun Cash)	%	\$
<b>Australian Fixed Interest</b>		
Suncorp Australian Fixed Interest Fund (Sun Aus FI)	%	\$
Vanguard Australian Fixed Interest Index Fund (Van Aus FI)	%	\$
<b>International Fixed Interest</b>		
Suncorp Global Fixed Interest Fund (Sun GFI)	%	\$
Vanguard International Fixed Interest Index Fund (Hedged) (Van Int FIH)	%	\$
<b>Diversified Fixed Interest</b>		
Macquarie Dynamic Bond Fund (Maq DynBond)	%	\$
<b>Diversified Credit</b>		
First Sentier Wholesale Global Credit Income Fund (FS GI Cred)	%	\$
<b>Australian Listed Property</b>		
Ironbark Paladin Property Securities Fund (Iro Pal Pro)	%	\$
Suncorp Australian Listed Property Index Fund (Sun Aus LP)	%	\$
<b>Global Listed Property (Australian and International)</b>		
Suncorp Global Property Fund (Sun GL Prop)	%	\$
<b>International Listed Infrastructure</b>		
Lazard Global Infrastructure Fund (Laz Glo Inf)	%	\$
<b>Australian Shares</b>		
Hyperion Australian Growth Companies Fund (Hyp Aus Gth)	%	\$
Suncorp Australian Shares Fund (Sun Aus Sh)	%	\$
Suncorp Australian Shares Multi-Manager Fund (Sun Aus MM)	%	\$
Suncorp Australian Shares Value Fund (Sun Aus Val)	%	\$
<b>International Shares</b>		
Suncorp International Shares Fund (Sun Int)	%	\$
Suncorp International Shares Multi-Manager Fund (Sun Int MM)	%	\$
Walter Scott Global Equity Fund (WalS Glo Eq)	%	\$
<b>International Shares - Specialist</b>		
Lazard Global Small Cap Fund (Laz Glo SMC)	%	\$

<b>CLOSED INVESTMENT OPTIONS^</b>		
<b>Secure</b>		
Asteron Traditional Capital Guaranteed Fund (Ast Tra CG)		% \$
<b>Australian Shares</b>		
CFS Wholesale Australian Shares Fund (CFS WS AEQ)		% \$
Pendal Imputation Fund (Pendal Imp)		% \$
<b>Australian Shares - Specialist</b>		
Ausbil Australian Emerging Leaders Fund (Ausb Aus EL)		% \$
Perpetual Wholesale Geared Aust Share Fund (Perp Geared)		% \$
<b>International Shares</b>		
Platinum International Fund (Pla Int)		% \$
<b>TOTAL</b>		<b>100 % \$</b>

^The investment options are only available to members that are invested in them before their closure date (and currently remain so) and wish to invest additional funds into these investment options.

### Auto Rebalancing (If Applicable)

If you're investing this money into different investment options from your existing investment strategy (your future investment options), we'd like to check a couple of things.

Does this mean you want to cancel auto-rebalancing on your account? Unless you tell us otherwise, we'll leave auto-rebalancing in place on your account.

- I'd like to continue using auto-rebalancing using my existing instructions.
- I have nominated a percentage based split for this contribution in column A of the Investment Selection section of this form, I'd like to continue using auto-rebalancing and change my existing investment strategy (my future investment options) to the options shown in column A of the Investment Selection section of this form.
- I'd like to cancel auto-rebalancing.

If you continue using auto-rebalancing and change your existing investment strategy (your future investment options) to the options shown in column A of the Investment Selection section of this form, we'll switch all your current investments (including this additional investment) to the investment strategy you have nominated in column A of the Investment Selection section of this form at each rebalancing date, which might not be what you want if you're choosing different options for this investment.

If your auto-rebalancing is cancelled now, you can easily start it again later (and nominate other investment options) by completing an investment switch online at [suncorp.com.au](http://suncorp.com.au).

### Tax File Number (TFN) Notification - for Super Accounts Only

It's important we have your TFN. It's up to you whether you give it to us, and it's not an offence if you don't, but we can't accept any after-tax contributions from you, it might be difficult to find super funds you may have forgotten about, to combine your super in one account, and you may pay more tax on concessional contributions (from pre-tax money - e.g. salary sacrifice) than you would otherwise. We're legally authorised to collect, use and disclose your TFN under the Superannuation Industry (Supervision) Act. And of course, we'll keep it confidential and only use it for lawful purposes, including finding or identifying your super funds, calculating tax on any superannuation lump sums, providing your TFN and other information to the Australian Taxation Office (ATO), and providing your TFN to your future super fund trustee or retirement savings account provider if you're transferring your account. These lawful purposes may change in the future, as a result of legislative changes. We won't pass on your TFN to another super fund if you write and tell us not to.

Tax File Number (TFN)

## Details of Account To Be Debited – For One-Off Direct Debits Only

Please complete this section if you would like SPSL Limited to debit an Australian Bank account to make this additional investment only.

Account name	<input type="text"/>		
Name of financial institution	<input type="text"/>		
Branch name or address	<input type="text"/>		
BSB number	<input type="text"/>	Account number	<input type="text"/>

**If paying via cheque: Please enclose your cheque with this form.**

## Direct Debit Request Authorisation (Bank Account Holder(s) to Complete)

I/We authorise SPSL Limited (User ID 252606), to debit/stop debiting my/our account via the Bulk Electronic Clearing System in accordance with the instructions detailed in the Schedule below or in the terms set out on the DDR Service Agreement

- I/We have read and understand the information contained in the DDR Service Agreement
- I'll/We'll notify the Trustee immediately if I'm no longer eligible to contribute
- Before or at the time I/we provided any personal information, I/we read and understood the Your Privacy section in the applicable Suncorp Brighter Super or Suncorp Employee Superannuation Plan Product Guide.
- I/We consent to the Trustee collecting, using and disclosing my/our personal information, including sensitive information in accordance with the Your Privacy Section, including for the purposes referred to in that section.
- This section needs to be signed by different people depending on who is making a direct debit contribution
  - Personal contributions – you must sign below
  - Spouse contributions – contributing spouse must sign below
  - Employer contributions – your employer must sign below

All bank account signatories must sign below.

### Account Holder A

Full name	<input type="text"/>		
Position in company	<input type="text"/>		

In the case of a company, two authorised signatories must sign unless a Sole Director and Sole Secretary or Sole Trader

Signature	<input type="text"/>	Date	<input type="text" value="DD / MM / YYYY"/>
-----------	----------------------	------	---

### Account Holder B

Full name	<input type="text"/>		
Position in company	<input type="text"/>		

In the case of a company, two authorised signatories must sign unless a Sole Director and Sole Secretary or Sole Trader

Signature	<input type="text"/>	Date	<input type="text" value="DD / MM / YYYY"/>
-----------	----------------------	------	---

## Declaration and Signature

By signing this form, I confirm:

- My investment choices have been made after reading the current PDS (including any documents incorporated by reference)
- I acknowledge, when I make any investment decisions or transact on my account, I 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 by downloading the information from your website.
- Before or at the time I provided any personal information, I read and understood the Your Privacy section in the applicable Suncorp Brighter Super or Suncorp Employee Superannuation Plan Product Guide.
- I consent to the Trustee collecting, using and disclosing my personal information including sensitive information, in accordance with the Your Privacy section.
- I understand that if I've not indicated otherwise above, auto-rebalancing will remain on my account.
- I understand that, if I've chosen to continue auto-rebalancing, then my current investments (including this additional investment) will be switched in line with my previously nominated future investment strategy on the first rebalancing date that my future investments have changed to.

Signature	<input type="text"/>	Date	<input type="text" value="DD / MM / YYYY"/>
Full name	<input type="text"/>		

### Please Note:

- The unit prices you'll receive for your request will depend upon the time and day we receive this form – please refer to the Suncorp Superannuation Product Disclosure Statement for your Suncorp Superannuation Product.
- You can only cancel the instructions in this form if we receive your cancellation request by 12pm on the same day we receive this form.
- We may delay the processing of your request until we receive all funds from an investment manager or if the transaction would adversely affect the interests of other account holders.
- Where we're directed by a lawful authority to suspend or vary the transaction, we'll comply with that direction.

Please send the completed form to:

Email: [super@spsl.com.au](mailto:super@spsl.com.au)  
Mail: GPO Box 2585, Brisbane QLD 4001

## Direct Debit Request (DDR) Service Agreement

This DDR Service Agreement forms part of the terms of the Direct Debit Request (DDR) and should be read in conjunction with this form.

### DDR

You can arrange to pay your superannuation (super) by DDR.

We'll process a direct debit to the account nominated on the DDR for the amount of the super contribution (plus any applicable government charges, GST and processing fees) on the date that it's due.

### Changing Your DDR Authority

We'll give you 14 days notice if we change any of the terms of the DDR.

### Deferring, stopping or cancelling your DDR

You may defer, alter, stop or cancel your DDR at any time by providing at least 5 business days notification in writing to any Suncorp Branch or by mail to: **Suncorp Super GPO Box 2585 Brisbane QLD 4001**

Or contact our Customer Service team on **13 11 55**

Requests to vary the details of the account to be debited must be in writing and in the terms of the operating authority from the account. Alternatively, you may stop or cancel your DDR at any time by contacting the financial institution where your account to be debited is held.

### DDR Dispute Resolution

If you wish to dispute a DDR transaction, you can contact the financial institution where your account to be debited is held, or contact us and we'll arrange for your disputed transaction to be investigated and where appropriate, for a correction to be made.

If we're unable to resolve the dispute to your satisfaction, you should contact the financial institution where the account to be debited is held to complete and lodge a DDR Customer Claim Form.

### Non-Business Days

If your DDR falls due on a weekend or public holiday in Sydney, we'll process it on the next business day. If you're uncertain of the date your DDR will be processed, you should contact your financial institution.

### Returned or Dishonoured DDRs

If your DDR is dishonoured or returned unpaid by your financial institution for any reason, we reserve the right to recover the funds from you.

### Clear Funds

You should ensure that you have sufficient clear funds in your account to enable the DDR to be paid by your financial institution.

### Your Records

We won't disclose any details of your DDR to any person or corporation unless requested to do so by law, or unless the information is required in relation to a disputed transaction.

### Your Account

You should be aware that some financial institutions may not allow a DDR to be processed to certain types of accounts. You should check your account details against a recent statement from your financial institution, or check with your financial institution to ensure that a DDR can be processed to your account.

---

### To make enquiries about your DDR:

**Email:** [super@spsl.com.au](mailto:super@spsl.com.au)

**Mail:** **GPO Box 2585, Brisbane QLD 4001**

**Or contact our Customer Service team on 13 11 55**