

Personal advice fee form

For Suncorp super members

Use this form to authorise the Trustee to pay an advice fee to your financial adviser from your Suncorp super account. You can also use this form to authorise a change or to cancel your existing fee arrangements with your financial adviser.

The law requires your written consent before a fee for financial advice can be deducted from your account.

Important Note: We can accept your instruction to cancel the deduction of an advice fee from your account. Otherwise, we are not able to accept your instruction unless it is signed by both yourself and your financial adviser. If you return the form to us without your financial adviser's signature, we will send the form to your financial adviser without taking any other action in respect of your request.

Tips to help you complete this form

- Use blue or black pen and write in CAPITAL letters
- Use an (X) to mark answer boxes
- Sign and date on the last page
- Fields denoted with * are mandatory fields

Have any questions?

If you'd like help completing this form, just call us between 9am and 5pm (AEST) Monday to Friday on 13 11 55 for Suncorp Brighter Super or 1800 191 517 for Suncorp Everyday Super.

1. Personal details

Account number*	<input type="text"/>	Date of birth*	<input type="text" value="DD / MM / YYYY"/>
Title*	<input type="text"/>		
Given name(s)*	<input type="text"/>		
Last name*	<input type="text"/>		
Your address*	<input type="text"/>		
		State	Postcode
Daytime phone number*	<input type="text"/>	Mobile phone number*	<input type="text"/>
Email address*	<input type="text"/>		

2. Your adviser's details

Adviser ID	<input type="text"/>		
Given name(s)*	<input type="text"/>		
Last name*	<input type="text"/>		
Company name*	<input type="text"/>		
Licensee name*	<input type="text"/>		
Address*	<input type="text"/>		
		State	Postcode
Daytime phone number*	<input type="text"/>	Mobile phone number*	<input type="text"/>
Email address*	<input type="text"/>		

3. Personal advice fee arrangement

This section allows a member and their financial adviser to agree a new personal advice fee to be charged to the member's Suncorp super account. If this will replace an existing arrangement, please also complete section 4 below. If you have any questions about how to complete this section, speak to your financial adviser.

One-off advice fee

Pay a one-off advice fee for the following amount:

\$ on

(this date must be within the next 12 months)

Services provided for one-off advice fee*

Financial advisers - please outline the services being provided under the advice fee arrangement you have with your client.

Ongoing advice fee

Change or commence an ongoing advice fee arrangement with this adviser for the following amount:

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

From this commencement or anniversary date (should not be more than 30 days after the date you sign this agreement).

We collect, use and disclose your personal information in accordance with our privacy policy. By providing us with your personal information you agree to us collecting, using and disclosing that information in accordance with our privacy policy.



4. Cancel an ongoing personal advice fee arrangement

This section allows a member to stop a personal advice fee from being deducted from the member's Suncorp super account. This will not cancel the advice fee arrangement between the member and adviser until the member notifies the adviser of the cancellation directly. The cancellation date will only apply to the deduction of advice fees under an arrangement with the adviser outlined in section 2.

Cancel ongoing advice fee

Cancel the payment of my current ongoing fee arrangement for this adviser.

Cancellation date

5. Important information about personal advice fee arrangements

- Personal advice fees can be payable as:
 - a one-off fixed dollar fee
 - an ongoing fixed dollar fee
 - an ongoing percentage of your account balance (up to a maximum of 2% pa)
- Ongoing advice fees are generally deducted from your account effective on or around the last day of the month (or earlier, if you leave Suncorp super part way through a month) for arrangements notified to the Trustee at least 5 business days before the end of the month.
- Ongoing advice fees cannot be deducted from the MySuper Suncorp Lifestage Fund. (i.e. the Suncorp Lifestage Fund in Brighter Super for Business, Everyday Super and Suncorp Employee Superannuation Plan)
- Personal advice fees that relate to an investment option other than Suncorp Lifestage Fund cannot be deducted from the Suncorp Lifestage Fund.
- The Trustee may at its absolute discretion refuse to deduct the personal advice fee and will only accept a personal advice fee arrangement you enter with an adviser if their Licensee and the Trustee have an arrangement in place or their Licensee agrees to enter into an arrangement with the Trustee, which governs the provision of financial advice in respect of Suncorp super products.
- An ongoing fee arrangement will cease 150 days after the next anniversary date unless it is renewed or cancelled earlier. If you wish to renew the arrangement, you will need to do this in writing with your adviser within 120 days of the next anniversary date. Your anniversary date for an ongoing fee arrangement is the date you first enter into or renew an ongoing fee arrangement with your adviser after 30 June 2021.
- Your consent for the deduction of an ongoing advice fee expires 150 days after the next anniversary date and your consent for a one-off advice fee expires when the fee is deducted.
- You can cancel the deduction of personal advice fees from your account at any time using this form or you can cancel a personal advice fee arrangement by advising your financial adviser in writing, who will let us know. You will need to discuss with your financial adviser how fees will be paid in respect of the advice that they provide.

6. Financial adviser declaration and signature

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 personal advice fees outlined above only relate to the services I provide for a Suncorp super product and my client has consented to the fees shown on this form being deducted from their account.
- I confirm that the personal advice I have provided (or will provide) is consistent with any arrangement in place between myself or my Licensee and the Trustee in respect of the Suncorp super product.
- if my client terminates an ongoing fee arrangement, I will notify the Trustee within 10 business days.

Adviser's signature*

Date*

7. 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 Suncorp super or pension account and to the *Important information about personal advice fee arrangements above*.
- I have read and understood the information provided in the relevant Product Disclosure Statement and Product Guide relating to the personal advice fee.
- I have agreed to the personal advice fee outlined above with my financial adviser and consent to the Trustee deducting the advice fees requested on this form.
- I confirm that these personal advice fees only relate to the services my financial adviser has provided (or will provide) for my Suncorp super or pension account.
- I understand that these personal advice fees will be deducted from my nominated Suncorp super or pension account and may erode my retirement benefits.
- I understand that I can cancel this personal advice fee arrangement by advising my financial adviser in writing and that personal advice fees will continue to be deducted from my account until my financial adviser provides a copy of my cancellation notice to the Trustee.
- I understand that I can cancel the deduction of personal advice fees from my account by notifying the Trustee in writing but I will still be liable to pay fees to my financial adviser until I cancel the fee arrangement with them.

Your signature*

Date

Your full name*

8. Where to send your form

Please send the completed form to:

Mail: Suncorp Super GPO Box 2585 Brisbane QLD 4001

Email: super@spsl.com.au