

## Direct debit request form

Issued 27 May 2017

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

**Use this form to set up a new direct debit arrangement for personal (individual) contributions or employer contributions (if your employer does not have an employer plan with Suncorp), or to change an existing arrangement**

You can complete this request through your online account instead of completing this form if you choose. Please visit [suncorp.com.au/super](http://suncorp.com.au/super).

### 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 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"/> |                      |                      |
| Daytime phone number | <input type="text"/> | Mobile phone number* | <input type="text"/> |
| Email address*       | <input type="text"/> |                      |                      |

## Employer details – Your employer should complete this if making employer contributions

|                                      |                      |                      |                      |
|--------------------------------------|----------------------|----------------------|----------------------|
| Company name*                        | <input type="text"/> |                      |                      |
| Trading name                         | <input type="text"/> |                      |                      |
| Full name of employer contact person | <input type="text"/> |                      |                      |
| ABN                                  | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Daytime phone number                 | <input type="text"/> | Mobile phone number* | <input type="text"/> |
| Email address*                       | <input type="text"/> |                      |                      |

\*mandatory field

## Direct debit options

Please select from one of the following options:

- Starting a new direct debit. Please continue to **Details of account to be debited**.
- Changing an existing direct debit. If you're not changing your account details, please go straight to **Direct debit amount details**.
- Cancel existing direct debit. Please continue to **Direct Debit Request authorisation**.

## Details of account to be debited

If you wish to establish more than one direct debit, you can photocopy this page or obtain another Direct debit request form from our website [suncorp.com.au/super](http://suncorp.com.au/super).

|   |                      |                                     |
|---|----------------------|-------------------------------------|
| Account name  | <input type="text"/> |                                     |
| Name of Australian financial institution where account held | <input type="text"/> |                                     |
| Branch name or address                                      | <input type="text"/> |                                     |
| Branch BSB  | <input type="text"/> | Account number <input type="text"/> |

## Direct debit amount details

Deduction frequency  Monthly  Quarterly  Half-yearly  Yearly

### Amount and contribution type

Please indicate the type and amount you'd like to be debited based on your nominated frequency, eg – if you have chosen 'monthly' and write \$150 below, we will debit \$150 per month from your account.

### Personal contributions

Voluntary employee / personal (after-tax) contributions \$ ,  .

Spouse contributions for the year \$ ,  .

Total personal contributions \$ ,  .

### Employer contributions

Award/SG contributions \$ ,  .

Salary sacrifice contributions^ \$ ,  .

Additional employer contributions \$ ,  .

Total employer contributions \$ ,  .

### Direct debit date

Your account will be debited on or around the fifteenth of the month and contributions will be invested according to your current investment strategy.

Start date  1 | 5 | / | m | m | / | y | y | y | y |

^ for Suncorp Employee Superannuation Plan (SESP) members only. If you want to make a salary sacrifice contribution from your Brighter Super or Everyday Super account, please contact your Human Resource department.

# Direct Debit Request (DDR) authorisation - bank account holder(s) to complete

- I/We authorise Suncorp Portfolio Services Limited (User ID 500097), to debit/stop debiting my/our account via the Bulk Electronic Clearing System in accordance with the instructions detailed in the schedule below or on the terms set out on the DDR Service Agreement.
- I/We have read and understand the information contained in the DDR Service Agreement.
- I/We'll notify the Trustee immediately if I'm no longer eligible to contribute.
- 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

Name

Position in company (employers only)

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

Signature  Date

## Account holder B

Name

Position in company (employers only)

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

Signature  Date

# Where to send the form

Please send the completed form to:



Suncorp Super  
GPO Box 2585  
Brisbane QLD 4001 Australia



super@suncorp.com.au

# 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 can change your debiting arrangement by informing us in writing, at least 7 working days before the debiting date for any of the following:

- altering the DDR;
- deferring a drawing;
- stopping an individual debit;
- suspending the DDR; and
- cancelling the debiting arrangement completely

## 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.

**Suncorp Super**  
**GPO Box 2585**  
**Brisbane QLD 4001**

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

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 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.

## If you wish to make enquiries about your DDR

You can contact us by emailing **[super@suncorp.com.au](mailto:super@suncorp.com.au)** or by writing to:

**Suncorp Super**  
**GPO Box 2585**  
**Brisbane QLD 4001**