

# CONTRIBUTION FORM – Personal, spouse and self-employed

## INSTRUCTIONS

Please use BLOCK LETTERS and BLACK PEN. You can make personal and spouse contributions online. Contact us on 1300 134 337 to create a secure online account.

We are unable to accept voluntary contributions without a tax file number (TFN).

## SECTION 1 – MEMBER DETAILS

Member number (if available)

Title  Surname  DOB

Given name(s)

Phone  Phone (business hours)

Mobile  Fax

Email

@

TFN  (if not previously provided)

## SECTION 2 – CONTRIBUTION TYPE

Select if you are:

- under age 65, or
- aged 65 to 74 and have been in paid employment for at least 40 hours in a period of not more than 30 consecutive days during the current financial year.

Select the type of contribution you wish to make (if more than one type, complete a separate form for each):

- Personal contribution **Go to section 3**
- Spouse contribution **Complete spouse contribution section below**
- Self-employed **Complete self-employed section below**

### Spouse contribution

Contributions can be made for your spouse or defacto partner. This can be useful if they are taking time off work to raise children.

Complete the details of the receiving spouse.

Member number

Name

Complete the details of the contributing spouse.

Member number (if applicable)

Name

Phone  Mobile

Email

@

### Self-employed

You may be able to deduct some or all of your contributions from your income tax if less than 10% of your assessable income and reportable fringe benefits are from employment as an employee.

- Tick if you want to claim any of your contributions as a deduction. A notice will be forwarded to you to complete.



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## SECTION 5 – DIRECT DEBIT REQUEST SERVICE AGREEMENT

The following is your direct debit service agreement with Australian Ethical Superannuation Pty Ltd – ABN: 43 079 259 733. By agreeing to this service agreement you request and authorise Australian Ethical Superannuation Pty Ltd & User ID: 365161 to arrange, through its own financial institution, a debt to your nominated account. This debit or charge will be made through the Bulk Electronic Clearing System (BECS) from your account held at the financial institution you have nominated. The agreement is designed to explain what your obligations are when undertaking a direct debit arrangement with us. It also details what our obligations are to you as your direct debit provider. We recommend you keep this agreement in a safe place for future reference. It forms part of the terms and conditions of your direct debit request (DDR).

### Definitions

- account means the account held at your financial institution from which we are authorised to arrange for funds to be debited.
- agreement means this direct debit request service agreement between you and us.
- banking day means a day other than a Saturday or a Sunday or a public holiday listed throughout Australia.
- debit day means the day that payment by you to us is due.
- debit payment means a particular transaction where a debit is made.
- direct debit request means the direct debit request between us and you.
- us or we means Australian Ethical Superannuation Pty Ltd, (the debit user) you have authorised by requesting a direct debit request.
- you means the customer who has signed or authorised by other means the direct debit request.
- your financial institution means the financial institution nominated by you on the DDR at which the account is maintained.

### 1. Debiting your account

1.1 By signing a direct debit request or by providing us with a valid instruction, you have authorised us to arrange for funds to be debited from your account. You should refer to the direct debit request and this agreement for the terms of the arrangement between us and you.

1.2 We will only arrange for funds to be debited from your account as authorised in the direct debit request. or

We will only arrange for funds to be debited from your account if we have sent to the address nominated by you in the direct debit request, a billing advice which specifies the amount payable by you to us and when it is due.

1.3 If the debit day falls on a day that is not a banking day, we may direct your financial institution to debit your account on the following banking day. If you are unsure about which day your account has or will be debited you should ask your financial institution.

### 2. Changes by us

2.1 We may vary any details of this agreement or a direct debit request at any time by giving you at least fourteen (14) days written notice.

### 3. Changes by you

3.1 You may change, stop or defer a debit payment, or terminate this agreement by providing us with at least fourteen (14) days notification by writing to:

Australian Ethical Superannuation Pty Ltd  
PO Box 1916  
Wollongong NSW 2500.

or

by telephoning us on 1300 134 337 during business hours;

or

arranging it through your own financial institution.

### 4. Your obligations

4.1 It is your responsibility to ensure that there are sufficient clear funds available in your account to allow a debit payment to be made in accordance with the direct debit request.

4.2 If there are insufficient clear funds in your account to meet a debit payment:

- (a) you may be charged a fee and/or interest by your financial institution
- (b) you may also incur fees or charges imposed or incurred by us and
- (c) you must arrange for the debit payment to be made by another method or arrange for sufficient clear funds to be in your account by an agreed time so that we can process the debit payment.

4.3 You should check your account statement to verify that the amounts debited from your account are correct.

4.4 If Australian Ethical Superannuation Pty Ltd is liable to pay goods and services tax ('GST') on a supply made in connection with this agreement, then you agree to pay Australian Ethical Superannuation Pty Ltd on demand an amount equal to the consideration payable for the supply multiplied by the prevailing GST rate.

### 5. Dispute

5.1 If you believe that there has been an error in debiting your account, you should notify us directly on 1300 134 337 and confirm that notice in writing with us as soon as possible so that we can resolve your query more quickly. Alternatively you can take it up with your financial institution direct.

5.2 If we conclude as a result of our investigations that your account has been incorrectly debited we will respond to your query by arranging for your financial institution to adjust your account (including interest and charges) accordingly. We will also notify you in writing of the amount by which your account has been adjusted.

5.3 If we conclude as a result of our investigations that your account has not been incorrectly debited we will respond to your query by providing you with reasons and any evidence for this finding in writing.

### 6. Accounts

You should check:

- (a) with your financial institution whether direct debiting is available from your account as direct debiting is not available on all accounts offered by financial institutions
- (b) your account details which you have provided to us are correct by checking them against a recent account statement and
- (c) with your financial institution before completing the direct debit request if you have any queries about how to complete the direct debit request.

### 7. Confidentiality

7.1 We will keep any information (including your account details) in your direct debit request confidential. We will make reasonable efforts to keep any such information that we have about you secure and to ensure that any of our employees or agents who have access to information about you do not make any unauthorised use, modification, reproduction or disclosure of that information.

7.2 We will only disclose information that we have about you:

- (a) to the extent specifically required by law; or
- (b) for the purposes of this agreement (including disclosing information in connection with any query or claim).

### 8. Notice

8.1 If you wish to notify us in writing about anything relating to this agreement, you should write to

Australian Ethical Superannuation Pty Ltd  
PO Box 1916  
Wollongong NSW 2500.

8.2 We will notify you by sending a notice in the ordinary post to the address you have given us in the direct debit request.

8.3 Any notice will be deemed to have been received on the third banking day after posting.