

# Application form

## Financial adviser use only

### Important

This Application Form is for investment in Australian Ethical Super and must not be circulated or distributed uncompleted unless accompanied by a copy of the latest Product Disclosure Statement (PDS), which contains information relevant to investing in the Super Fund. You can download a current PDS at [australianethical.com.au](http://australianethical.com.au)

Please use **BLOCK LETTERS** and **black ink**.

You should read and understand the Product Disclosure Statement before making an investment. Interests in the Australian Ethical Retail Superannuation Fund are offered by Australian Ethical Investment Limited (ABN 47 003 188 930, AFSL 229949) and issued by the Trustee of the Fund, Australian Ethical Superannuation Pty Ltd (ABN 43 079 259 733, RSEL L0001441, SPIN AET0100AU).

### Send your completed form to:

Australian Ethical Super, Locked Bag 20013, Melbourne VIC 3001.

## Step 1: Personal details

Title

Mr

Mrs

Ms

Miss

Other, please specify

Full given name(s)

Date of birth

D	D	M	M	Y	Y	Y	Y
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Surname

Email\*

Mobile Phone

Home Phone

Work Phone

Sex

Male

Female

We need to collect information about the chromosomal sex at birth of our members because this affects the overall cost of default group insurance cover which is automatically available to all members of the Fund. We understand sex at birth is different to gender identity.

\*If you provide your email address we will set your communication preference to online by default. You can change your communications preferences in client access on our website, or by calling us.

### Residential address (PO Box is NOT acceptable)

Street number and name

Suburb

State

Postcode

Country

### Postal address (If different to residential address)

Street number and name

Suburb

State

Postcode

Country

## Step 1: Personal details contd..

### Tax File Number (TFN)

Tax File Number

Under the Superannuation Industry (Supervision) Act 1993, Australian Ethical Super is authorised to collect, use and disclose your tax file number (TFN). The Trustee of Australian Ethical Super may disclose your TFN to another super provider, when your benefits are being transferred, unless you request the Trustee in writing that your TFN not be disclosed to any other super provider. Declining to quote your TFN to the trustee is not an offence. However giving your TFN to your super fund will have the following advantages:

- Australian Ethical Super will be able to accept all permitted types of contributions to your account(s);
- other than the tax that may ordinarily apply, you will not pay more tax than you need to - this affects both contributions to your super and benefit payments when you start drawing down your super benefits;
- it will make it much easier to find different super accounts in your name so that you receive all your super benefits when you retire;
- the Trustee will be able to use the ATO SuperTICK service to verify your TFN, name and date of birth; and upon your request, the Trustee will be able to find and consolidate your other super into your Australian Ethical Super account using the ATO's Super Match service

## Step 2: Selecting your investment options

Select your preferred investment option or spread of options.

If no selection is made your super will be invested in the Balanced option.

Options	Percentage*
Defensive	
Conservative	
Balanced	
Advocacy	
Growth	
Australian Shares	
International Shares	
<b>TOTAL</b>	<b>100%</b>

\*Ensure that your investment selections total 100% and that each option is in whole percentages.

## Step : Declaration and signature

By completing the Application Form I declare that:

### My application is lawful because

- All the details I have provided for this application are true and correct.
- I received and accepted this offer in Australia.

### I have made an informed decision because

- I have read the PDS to which this application applies.
- If I have received the PDS from the internet or by other electronic means, I have received the entire document.

### I am responsible for my decision to make this application, and

- I acknowledge that no representation has been made to me by or on behalf of Australian Ethical other than those contained in the PDS.
- I am not making this application because of an unsolicited meeting with or phone call from another person.

### I am aware that Australian Ethical Super will have records of my personal information, and consent to my information being used and/or disclosed to:

- administer my investment;
- provide information to me;
- conduct market research and analysis;
- develop products;
- meet regulatory obligations;
- inform the licensee or adviser I have indicated on the Application Form, until I notify you otherwise.\*

\* Our Privacy Policy available on our website outlines more information on how we collect, secure, use and disclose your personal information.

## Signature

I have read, understood and agree to the above declaration.

Signature

X

Date

D	D	M	M	Y	Y	Y	Y
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Signatory's full name (please print)

## Important information about Insurance

You will be automatically insured for three units of death, terminal illness and total and permanent disablement (TPD) cover when you first join the Fund. You can choose to cancel any Death & TPD insurance cover you have through Australian Ethical Super, and can elect to opt-out of the Default Cover provided to you, at any time by writing to us at Australian Ethical Superannuation or by logging into your member portal at [australianethical.com.au](http://australianethical.com.au). When you opt-out or cancel your insurance, you will no longer be insured for that benefit through the Fund. We recommend that you discuss this with your Financial Adviser before making this decision.

## Contact us

- t 1300 134 337
- e [members@australianethical.com.au](mailto:members@australianethical.com.au)
- w [australianethical.com.au](http://australianethical.com.au)
- p Australian Ethical Super 20013, Melbourne VIC 3001.