

Qantas Super

Advice fee deduction form for Mercer Financial Advisers

You can request the Trustee to deduct the portion of a personal financial advice fee (in respect of personal financial advice provided by a Mercer financial adviser) directly related to your account in Qantas Super. This option is only available to Qantas Super members in the following divisions: Gateway (including Income Accounts), Division 3A, Division 5, Division 6, Division 7, and Division 10.

If you need help

For assistance call the Qantas Super Helpline on 1300 362 967, Monday to Friday, 8am to 7pm (AEST).

Please print in black or blue pen, in uppercase, one character per box.
A

Step 1 – Complete your personal details

Division

Title Mr Mrs Ms Miss Other

Date of birth / /

Given names

Surname

Postal address

Suburb

State

Postcode

Daytime telephone -

Mobile

E-mail


Membership number

Income policy number (Income Account holders only)*

* If you hold multiple income policies, please specify the income policy from which the advice fee is to be deducted.

Continued over

Issued by Qantas Superannuation Limited ABN 47 003 806 960 AFSL 288330 as Trustee of the Qantas Superannuation Plan ABN 41 272 198 829 (Qantas Super or Plan)



Step 2 – Amount of Advice fees to be deducted from my account in Qantas Super

1. Once-off Advice fees (tick box):

Initial advice \$ (\$5,000 limit)

Further advice \$ (\$5,000 limit)

2. Ongoing Advice fees (tick box):

I agree to an ongoing Advice fee of % (up to 2% per annum) of my super/pension account balance.

I understand and agree that the above amount will be deducted by the trustee from my account in Qantas Super and paid to Mercer Financial Advice (Australia) Pty Ltd (MFA).

I understand and agree this amount will be deducted monthly by the trustee from my (tick as applicable) super account pension account and paid to MFA.

Note: Please note that you can only request the payment of one advice fee from your membership in Qantas Super in any rolling 12 month period and the maximum value cannot exceed \$5,000 (inclusive of GST). The balance remaining in your account after deduction of the advice fee cannot be less than \$5,000 or result in an insufficient balance to fund any remaining income stream payments (if applicable).

Step 3 – Member Declaration

By signing this form I declare that:

- I have read and understood the information on this form;
- The information I have provided on this form is true and correct;
- I confirm that the amount to be deducted from my super account is solely in relation to advice provided to me in relation to my benefits in Qantas Super and is of a reasonable amount for the advice provided to me;
- I confirm I have received a Statement of Advice or Record of Advice, and understand that the Trustee may request a full copy of the advice if required;
- I understand that the fee nominated will be deducted from my Qantas Super account on receipt of all information required by the Trustee;
- I understand that the value of my account balance in Qantas Super will decrease by the amount of the fee paid in accordance with my request;
- I understand that the fee nominated will be deducted in the same proportion as how my existing account balance is invested at the time of the deduction;
- I understand that the Trustee may not be able to action my request where the Trustee has been notified of family law proceedings in relation to my account in Qantas Super;
- I acknowledge that the Trustee may decline a request to pay this adviser service fee in order to comply with its obligations under financial services law, and it may be an offence including an illegal early release of super scheme if the above confirmation is not true and correct;
- I understand that information contained in this form will be relied upon and used by the Trustee to process my request to deduct a personal advice fee from my account in Qantas Super, and if necessary, to update my Qantas Super member records so that the Trustee can contact me more efficiently in the future regarding my Qantas Super account. For this purpose, personal information may be disclosed to the Trustee's administrator, government agencies, my employer and other parties as required. By signing this form I consent to the handling of my personal information in this manner. If I do not provide the information my request may not be processed;
- I understand that I can access my personal information by writing to the Qantas Super Plan Privacy Officer, at the address below; and
- I understand and agree that my request will not be processed if:
 - I have not completed Step 2 of this form;
 - I have already submitted a request for the payment of an advice fee from my account within the last 12 months;
 - the ongoing Advice fee is more than 2%p.a.; or
 - the advice fee exceeds the maximum of \$5,000 (inclusive of GST) or the balance remaining in my account after deduction of the fee will be less than \$5,000 or result in an insufficient balance to fund any remaining income stream payments (if applicable).

Signature

Date

/ /



Adviser use only

Adviser name

Adviser's office

Adviser declaration and signature

I confirm that the advice fee to be deducted from the member's account balance is solely in relation to their benefits in Qantas Super and is not an ongoing service fee.

I confirm I have provided the member with either a Statement of Advice or Record of Advice, and understand that the Trustee may request a full copy of the advice if required.

I understand Qantas Super may be unable to pay the advice fee if there are sufficient funds in the member's account to do so and that the Trustee reserves the right to decline payment of this advice fee (as well as any future advice fee payment requests).

Signature
of adviser

Date / /

Please return your completed form to Qantas Super, GPO Box 4303, Melbourne, VIC 3001.

