

Qantas Super Consent to pay Advice fee from Super form for advisers (other than Mercer Financial Adviser)

You can request the Trustee to deduct the portion of a personal financial advice fee directly related to your account in Qantas Super.

If you need help completing this form

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

Step 1 – Complete your personal details

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



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

Superannuation fund details

Fund name: Qantas Super

Phone: 1300 362 967

Website: www.qantassuper.com.au



Step 2 – Consent for Advice fees to be deducted from my Qantas Super account – to be completed by the member

Qantas Super is legally required to get your written consent before the financial advice fee can be deducted from your account. Please complete and sign the below section to provide your consent.

One-Off advice fees are only able to be deducted from a members account held in this fund.

Only ONE payment can be made from your account in any given 12 month period. The maximum amount that may be deducted from your account is \$5,000.

Important Notes

1. For Divisions 3A, 5, 6, 7, 10 and Gateway (including income accounts): The balance remaining in your account must be at least \$6,000. And for Income Accounts, the balance remaining must also be sufficient to fund any remaining income payments in the current financial year.
2. For Division 1, 2, 3 and 15: One-off advice fees will be deducted from your Member Voluntary Account. If you don't have any existing funds in this account, this account will be negative after your advice fee deduction. Credited interest applies to this account, based on your investment option i.e. your negative balance will increase if investment earnings are positive. Any negative balance in your Member Voluntary Account will be deducted from your benefit when you leave your Division.

Please select from the following options and include all applicable information (tick box):

One-off advice fee inclusive of GST \$, .

Date of Service / /

One-off advice fees will be deducted from your account at the time of receiving this form. Your consent will expire once the deduction has been processed and your adviser will have to ask you for your consent before any further advice fees are deducted from your Qantas Super account.

By signing this form, I consent and confirm the following

- The services provided by the financial advice that this fee relates to is in relation to my account held with Qantas Super.
- I am aware that if I am not satisfied with the services described by my adviser I do not have to sign this consent.
- I can withdraw my consent by contacting the fund on 1300 362 967 and understand I must contact the fund before the amount has been deducted from my account.
- I consent for the advice fees requested on this form be deducted from my Qantas Super account and paid to my adviser.

Member Signature

Date / /

How to cancel your advice fee

You should speak to your adviser if you are not satisfied with the services provided before signing this form.

If you no longer wish to have the advice fee deducted from your account you will need to contact us before the amount has been deducted from your account.

To withdraw your consent to the deduction of fees from your super account contact Qantas Super by:

- Phone on 1300 362 967
- In writing by mail to
GPO Box 4303
Melbourne VIC 3001



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 account is solely in relation to advice provided to me in relation to my benefits in Qantas Super, is not an ongoing service fee 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 consent for the advice fee as detailed above to be deducted from my super account and I have signed the consent for this advice fee;
- I understand that the fee nominated will be deducted from my 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 the fee nominated 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
- 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 one-off advice fee deduction is more than \$5,000 (including GST); or
 - the balance remaining in my super account after the deduction of the fee will be less than \$6,000; or
 - the balance remaining in my income account is not sufficient to cover my remaining annual income payments.

Signature

Date

 / /

Adviser details - to be completed by the adviser

Adviser name

Business Name

AFSL Number

ASIC Financial Adviser Register Number

Phone

Email



Adviser use only

Note: If you are part of a dealer group, payment details for the dealer group are to be provided below.

I wish to have payment made by:

Cheque EFT

Banking details for Electronic Funds Transfer (EFT) payment

Company Details

Company Name

Address

Suburb

State

Postcode

Telephone

Email

Remittance advice via

Email Post

I/We hereby agree for all payments by Qantas Super for services supplied to be made by way of direct credit to the bank account details below.

I/We hereby guarantee that the following details are correct, and agree to indemnify Qantas Super against any loss or damage suffered if the details provided are incorrect.

The information provided will be used solely for payment of the fee nominated on this form and will not be used for any other purpose.

Banking Details for Electronic Funds Transfer (EFT) payment

Name of Institution

Branch name

BSB

Account number

Account name

Approved by

Adviser name

Adviser's office

Continue over



Adviser use only (continued)

Adviser declaration and signature

As the financial adviser I declare that:

- The advice fee being requested is in relation to the members account held in Qantas Super and I can confirm this fee includes the following services (*please list types of services provided*):

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| | |

- The service arrangement for this advice fee is a one off advice fee.
- I understand the Trustee may be in contact with me in relation to this advice fee arrangement and may seek confirmation that services have or will be provided.
- I understand Qantas Super may be unable to pay the advice fee if there are insufficient funds in the member's account to do so and that the Trustee reserves the right to decline payment of this advice fee.

Signature
of adviser

Date

 / /

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

