



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

Advice fee (Initial or once-off) \$

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).

I understand and agree that the above amount will be deducted by the Trustee from my account in Qantas Super and be paid to:

Name of adviser

## 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, 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 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 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;
  - the adviser I have nominated in Step 2 of the form has not been approved by the Trustee;
  - I have already submitted a request for the payment of an advice fee from my account within the last 12 months; 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 details

**Please attach a copy of the fee invoice**

Adviser name

Company name/authorised representative of

AFS Licence number

AFS Authorised representative number

Telephone

E-mail

# 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

Fax

Email

Remittance advice via

Email       Fax       Post

I/We hereby agree for all payments by Qantas Super for goods and 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 financial management 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

*Continued over*



## Adviser use only (continued)

### Approved by

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.**

