

3. Contribution/rollover details (continued)

Rollovers

If you are transferring from another super fund please provide the below details. You will also need to complete the 'Transfer authority' form for each rollover being requested.

Name of the previous institution	Policy /Account number	Approximate amount
		\$
		\$
		\$
		\$
		\$
Total		\$

Savings plan

Only complete this section if you would like to establish a savings plan to make regular contributions from a nominated bank account. You will also need to nominate a bank account in section 5, from which contributions will be deducted under the savings plan.

Contribution type If you are eligible and intend to claim a tax deduction on your Personal Contributions you will need to complete section 4.	personal <input type="checkbox"/> spouse <input type="checkbox"/>
Amount	\$
Frequency	monthly (default) <input type="checkbox"/> quarterly <input type="checkbox"/>

4. Tax deduction for personal contributions

Tax deduction for your personal contributions (including one-off and savings plan contributions)

I am eligible and intend to claim a tax deduction for my personal contributions of:

\$

(one-off contribution)

This is your notice to us, to be effective from the later of the date of this application or the date that you become a member of the Super Plan, of the amount you intend to claim as a tax deduction in relation to Section 290-170 of the Income Tax Assessment Act 1997. We will deduct 15% contributions tax from this amount. This notice will be applicable for the current and future financial years (for contributions made under the savings plan) unless you notify us in writing of your intention to vary this notice. We will send you an acknowledgement of the amount you wish to claim as a tax deduction which you will need to retain for tax purposes for the current and future financial years (for contributions made under the savings plan).

5. Bank account details (if applicable)

By providing your bank account details in this section, you authorise us to use these details for all future transaction requests that you nominate.

Bank account 1

Complete your bank account details in this section and indicate what you would like us to use these bank account details for

☐ applications

☐ savings plan

☐ withdrawals

financial institution

branch

BSB

–

account number

account name

signature of account holder A

signature of account holder B

date

/

/

I request and authorise Perpetual Investment Management Limited, Debit User Identification Number 263347 to arrange for any amount Perpetual Investment Management Limited may debit or charge me to be debited through the Bulk Electronic Clearing System from an account held at the financial institution identified above, subject to the terms and conditions of the Direct Debit Request Service Agreement which is available from www.perpetual.com.au/select-super-updates.

6. Features (must be completed)

Indicate which optional features you would like applied to your account			Frequency (if applicable)	
Auto-rebalancing If no frequency is selected, quarterly will be assumed	yes	<input type="checkbox"/>	quarterly (default)	<input type="checkbox"/>
			half-yearly	<input type="checkbox"/>
			yearly	<input type="checkbox"/>
BPAY (additional investments)	yes (default)	<input type="checkbox"/>	n/a	
	no	<input type="checkbox"/>		
Adviser Online Account Access Note: your adviser can access information about your account online	view & transact (default)	<input type="checkbox"/>	n/a	
	view only	<input type="checkbox"/>		

- For each optional feature you have elected, please ensure you have read and understood the relevant section in the ‘Your Super Plan account’ document available on our website for that optional facility.

7. Investment details

The way you initially allocate your money across investment options becomes your investment strategy. All future contributions will be allocated according to your investment strategy.

Investment options	Short code	Investment strategy
Conservative	SSCOST	%
Diversified	SSDVST	%
Balanced	SSBAST	%
Growth	SSGRST	%
High Growth	SSEQST	%
Cash	SSCAST	%
Australian Share	SSAEST	%
International Share	SSINST	%
Total		100%

8. Declaration and signature (must be completed)

I declare and agree that:

- I have read and understood the Product Disclosure Statement (PDS) and any relevant incorporated material for Select Super Plan and confirm I accept this offer in Australia
- all of the information provided in my application is true and correct
- If I have received the PDS from the internet or other electronic means that I received it personally or a print out of it, accompanied by or attached to this application form
- I have read, understood and agree to be bound by, any additional restrictions in the PDS and any incorporated material and I agree to be bound by the provisions of the Trust Deed (as amended from time to time)
- If applicable, in the case of contributions, that I have read and understood the contribution eligibility rules in the PDS and that I am eligible to make or have contributions made for my benefit and will notify the Trustee if I am no longer eligible
- If I am claiming a personal tax deduction in relation to my contributions
 - I intend to claim the personal contributions stated as a tax deduction
 - I am a current member of Select Super Plan
 - Select Super Plan currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part of these contributions
 - I have not included any of the contributions in an earlier valid notice.
- I declare that I am lodging this notice at the earlier of either:
 - before the end of the day that I lodged my income tax return for the income year in which the personal contributions were made, or
 - before the end of the income year following the year in which the contribution was made.
- I authorise the Trustee to quote my TFN or exemption to the Australian Taxation Office (ATO).
- I authorise the Trustee to obtain information from the ATO regarding my superannuation account in relation to my TFN, PAYG or other superannuation tax-related matters.
- I acknowledge that neither the Trustee, Perpetual Trustee Company Limited, nor any of their related entities, guarantees the repayment of capital or the performance of the Super Plan.
- If investing under the Savings Plan, I have read the Direct Debit Request Service Agreement and have completed sections 3 and 5.

8. Declaration and signature (must be completed) (continued)

- I acknowledge that:
 - I have read and understand the privacy disclosure as detailed in the PDS. I consent to my personal information being collected, held, used and disclosed in accordance with the privacy disclosure
 - The Trustee is required to provide information to the ATO regarding any superannuation account
 - The Trustee will hold personal information about me and will disclose this information to my financial adviser in relation to the investments described in this form. Where there is any change to this authority or relating to my financial adviser, I will notify the Trustee of the change
 - neither the Trustee, Perpetual Trustee Company Limited, nor any of their related entities, guarantees the repayment of capital or the performance of the Select Super Plan or any investment option.

signature of member	<div></div>	date	<div></div>	/	<div></div>	/	<div></div>	<div></div>	<div></div>	<div></div>
print name	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>

Important notes:

- If signing under power of attorney, the attorney certifies that he or she has not received notice of revocation of that power. The power of attorney, or a certified copy, must be sent to us, if not previously provided.
- We have the absolute discretion to accept or reject any application.
- A business day is a working day for us in Sydney.

Final checklist

Have you:

- Completed all sections of your application form?
- Signed your application form?

Please send your completed application form to:

Perpetual Select Super and Pension
Reply Paid 95150
PO Box 616
Parramatta NSW 2124

or email selectsuperandpension@perpetual.com.au