

# New member options form



As a new member, it's important we set your account up as you would like it. Take a few minutes to supply your correct contact details and review your investment and insurance options.

Please complete in black ink and BLOCK letters and return to: Club Plus Super Administration, Locked Bag 5007, Parramatta NSW 2124 or email to [member@clubplussuper.com.au](mailto:member@clubplussuper.com.au). This form will be invalid if not signed and dated.



Alternatively, you can update your details and preferences online instead of completing this form. It's as easy as logging into your account at [clubplussuper.com.au/memberaccess](http://clubplussuper.com.au/memberaccess).



## Section 1: Personal details

Member number

Gender

Have you previously registered as a member of Club Plus Super?

Yes

No

Male

Female

Title: Mr/Mrs/Ms/Miss/Other

Surname

Given name(s)

Postal address

Suburb/Town

State

Postcode

Residential address (if different to postal address)

Suburb/Town

State

Postcode

Phone number

Mobile number

Email

Date of birth (DD/MM/YYYY)



## New member options form (cont.)



### Section 2: Insurance

If you are eligible and would like default insurance cover consisting of one unit of Death, and Total and Permanent Disablement (TPD) insurance and Short-Term Income Protection cover, you must elect this within **60 days** from the date you join Club Plus Super.

**I elect to opt in to hold default insurance cover.**

If you have opted in to cover above, the Short-Term Income Protection cover will have a **30 day waiting period** as the default. Optional waiting periods of 45 days and 90 days are available. Select one from the following waiting period options:

30 days (default)

45 days

90 days

**Note: Premiums vary based on waiting periods.**

**Note: If you have not opted in for insurance cover above, this will be provided automatically at the later of you attaining age 25 and your super balance reaching \$6,000. If you do not wish for this to occur, please advise below.**

**I do not wish for insurance cover to be automatically added to my account.**



#### You can change your insurance cover later.

You can apply for insurance, increase your cover or cancel any insurance you hold at any time during your membership with Club Plus Super. For more information see the *Industry Insurance Booklet* available at [clubplussuper.com.au/pds](http://clubplussuper.com.au/pds).



### Section 3: Providing your Tax File Number (TFN) (Your employer may have provided your TFN to us on your behalf.)

Under the Superannuation Industry (Supervision) Act 1993, your super fund is authorised to collect, use and disclose your TFN, which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change.

The trustee of your super fund may disclose your TFN to another super provider, when your benefits are being transferred, unless you request the trustee of your super fund in writing that your TFN not be disclosed to any other super provider.

Declining to quote your TFN to the trustee of your super fund is not an offence. However giving your TFN to your super fund will have the following advantages:

- your super fund 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; and
- 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.

**I authorise Club Plus Super to use my Tax File Number to search the ATO for other superannuation monies and to let me know what is found. I understand Club Plus Super will automatically transfer any amount held by the ATO to my Club Plus Super account.**

**Tax File Number:**



### Section 4: Transfer of existing benefits

In Section 3, we asked for consent to look for your super money with the ATO. This section is about your super money that may be sitting within other Australian super funds.

If you would you like to have your existing superannuation transferred to Club Plus Super, we can help you do this over the phone. Just give us a call on **1800 680 627**. Alternatively, you can complete this process online at: [supermatch.clubplussuper.com.au](http://supermatch.clubplussuper.com.au) or fill in the *Superannuation Rollover form* available at [clubplussuper.com.au/tools-forms](http://clubplussuper.com.au/tools-forms).

# New member options form (cont.)



## Section 5: Investment choice options

If you would like to select investment option(s) for all future transactions, please specify one or more of the below. If you do not make a selection, you will be invested in the default investment option, MySuper (Balanced). For more information about our investment options please refer to the *Investment Booklet* available from [clubplussuper.com.au/pds](http://clubplussuper.com.au/pds).

Cash:	<input type="text"/>	%	Growth:	<input type="text"/>	%	International Shares:	<input type="text"/>	%
Conservative Balanced:	<input type="text"/>	%	High Growth:	<input type="text"/>	%			
MySuper (Balanced):	<input type="text"/>	%	Australian Shares:	<input type="text"/>	%			

**Note:** Include whole percentages (e.g. 25%, 55% etc.). All amounts must add up to 100%.



## Section 6: Beneficiaries

It's important to nominate beneficiary(ies) to receive your super and any insurance benefits that are payable in the case of your death. In order to provide certainty about the distribution of your death benefit, we recommend you complete a *Binding Death Nomination Form* and keep it up to date throughout your membership.

A *Binding Death Nomination Form* is available in this welcome pack or at [clubplussuper.com.au/tools-forms](http://clubplussuper.com.au/tools-forms).



## Section 7: Privacy

The personal information provided on this form is collected by and held for Club Plus Super by the fund administrator Australian Administration Services (AAS) in accordance with the Australian Privacy Principles of the *Privacy Act 1988 (Cth)*, for the purpose of administering accounts and providing services associated with your membership of the Fund.

You should read the *Privacy Policy* at [clubplussuper.com.au/privacy-policy](http://clubplussuper.com.au/privacy-policy) before completing the form. Call us on **1800 680 627** for a hard copy of the Policy. The Policy contains information about how personal information is collected, used and disclosed, how you can correct your personal information, make a complaint about a privacy breach and other important information about safeguards in place to protect your personal information.

By providing your information, you acknowledge that you have read and understood the *Privacy Policy*.



## Section 8: Declaration

I declare that:

- my answers and declarations on this form are true and correct;
- I have read and understood the current *Industry division PDS and Booklets*;
- I understand Club Plus Super may use my email address and/or mobile number to contact me about my member statements, disclosures and other important communications, newsletters, updates and other marketing notifications.
- I have read and understood the terms and conditions of the insurance cover and I understand that if I have elected to have cover, premiums will be deducted from my account;
- I will be invested in the MySuper (Balanced) investment option, unless I make an investment selection in Section 3;
- the Trustee may use my personal information for the purposes described in the *Privacy Policy*; and
- I will abide by and be bound by the Trust Deed and Rules.

**Member's signature**

**Date (DD/MM/YY)**

This page has been left blank intentionally