

Ongoing Advice Service fee Consent for deduction from TelstraSuper account

Complete and sign this form to provide your consent and authorise Telstra Super Financial Planning Pty Ltd (TSFP) (we, us) to deduct the payment of some or all of the advice fee for the ongoing advice service from your TelstraSuper account as detailed below.

If you have any questions please contact your Financial Planner.

Important information

- TSFP is required by law to obtain your written consent before deducting any ongoing advice fees from your TelstraSuper account
- If you are not happy with the amount of the fee described, or the amount of the fee described does not reflect the ongoing advice fee agreed with your Financial Planner, you are not obliged to sign the consent. Please contact your Financial Planner to discuss this further
- Your consent is valid until 150 days after the anniversary day* of the ongoing advice service agreement. We will contact you annually to obtain your continued consent to deduct the ongoing advice fees. You may vary or withdraw your consent at any time by notifying us in writing
- The provision of your ongoing advice service and the payment of your ongoing advice fees for this service is subject to the terms and conditions of the ongoing advice service agreement you have agreed with TSFP
- The ongoing advice fee payable by you (and your spouse, where applicable) is the advice fee as described in your ongoing advice service agreement. If your spouse is a party to the ongoing advice service agreement, this form relates to the amount of the ongoing advice fee payable by you (and is permitted to be deducted from your TelstraSuper account) as determined by your Financial Planner. Your spouse must also complete a separate form to consent to the deduction of ongoing advice fees from a relevant TelstraSuper account, in proportion to the advice related to your spouse. Further details are outlined below in sections B & C of this form
- The ongoing advice fee amount is deducted from your TelstraSuper account in arrears on a quarterly basis on or around 31 March, 30 June, 30 September and 31 December, following the commencement of your ongoing advice service. The ongoing advice fee will be pro-rated, beginning from the first quarter of the ongoing advice service agreement
- The ongoing advice fee amount will be deducted proportionately from the Choice investment options in which your TelstraSuper account is invested (excluding the Direct Access investment option where applicable). The ongoing advice fee cannot be deducted from a MySuper product
- If you have more than one TelstraSuper account you must nominate the account from which the ongoing advice fee is to be deducted. If there are insufficient funds in your nominated account, the ongoing advice fee will be deducted from another of your TelstraSuper accounts where applicable, and where you have provided your consent for us to do so. Where you do not have another TelstraSuper account, or where you have such an account and do not consent to the ongoing advice fees being deducted from that account, then payment must be made from a bank account.

*Anniversary day is the anniversary of the day on which the ongoing advice service agreement commences.

A

Your information

Title	Mr	Mrs	Miss	Ms	Other	
Surname					Member number	
Given name(s)					Date of birth	
Residential address (PO Box not acceptable)						
Suburb				State	Postcode	
Mobile				Contact phone no.		
Email						

B

The total ongoing advice fee payable under the ongoing advice service agreement is

\$ _____ per year (plus GST where applicable)

The ongoing advice fee payable by you, as determined by your Financial Planner (where applicable)

\$ _____ per year (plus GST where applicable)

The ongoing advice fee amount to be deducted from your nominated TelstraSuper account (detailed in Section C)

\$ _____ per year

\$ _____ per quarter (approximately)[†]

Note: We have used the full quarter's payment as an estimate (rather than a pro-rated amount). Only that portion of the advice that relates to superannuation, can be payable from your TelstraSuper account.

[†] This quarterly figure is a fee estimate only, based on the ongoing advice fee being pro-rated for the first quarter of the ongoing advice service period (as the commencement date will only be known once we have received your signed ongoing advice service agreement and the number of days in each quarter varies).

C**Account nomination**

Please nominate the account from which the ongoing advice fee is to be deducted e.g. TelstraSuper Corporate Plus, TelstraSuper Personal Plus, TelstraSuper RetireAccess and specify the account number:

Account

Account number

D**Client declaration & signature:**

I declare that:

- I have read and understood the Important Information section of this form
- All details provided on this form are true and correct
- I understand that by signing this form, I consent to the ongoing advice fees, as outlined in Section B, being deducted from my nominated TelstraSuper account as outlined in Section C
- I understand that my consent for fees to be deducted from my TelstraSuper account will expire (as outlined in the Important Information section) and if I wish to continue with the ongoing advice services, I will need to provide TSFP with my written consent again for the ongoing advice fees to be deducted
- I agree to pay the ongoing advice fee specified for the ongoing advice service to be provided to me (and my spouse, where applicable) by TSFP
- I understand that the ongoing advice fee amount specified is based on the ongoing advice fee applicable at the date this form is signed by me
- I authorise and provide my written consent to Telstra Super Pty Ltd, the trustee of TelstraSuper, to deduct the advice fee amount from my TelstraSuper account and pay the advice fee amount to TSFP on my behalf
- I understand that the balance of my TelstraSuper account will be reduced by the advice fee amount.

Name

Signature

X

Date

OFFICE USE ONLY

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Percentage of the advice fee payable by the client

25% 50% 75% 100%

Percentage of the advice fee payable to be deducted from the client's TelstraSuper account

25% 50% 75% 100%

Financial Planner declaration & signature

I declare that I have:

- provided the client with all of the required information regarding the advice fee for the ongoing advice service; and
- determined the appropriate advice fee that can be deducted from the client's TelstraSuper account in accordance with legislative requirements.

Financial Planner name

Financial Planner signature

X

Date Ongoing Advice Service Agreement signed by client:

Please return the completed form to:**Email fas@telstrasuper.com.au**

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