

# One-off Advice Fee: Consent & deduction from TelstraSuper account



Complete and sign this form to provide your consent and authorise Telstra Super Pty Ltd (ABN 86 007 422 522, AFSL 236709), the trustee of TelstraSuper, to deduct some or all of the payment of the advice fee as detailed below from your TelstraSuper account to pay TelstraSuper Financial Planning (TSFP) for the provision of one-off (non-ongoing) personal advice to you. As part of that personal advice you will be provided with a Statement of Advice (SOA) which covers advice on your superannuation arrangements.

If you have any questions please contact your Financial Planner.

## Important information

- TelstraSuper is required by law to obtain your written consent before the fee for financial advice can be deducted from your super account. If you are not happy with the amount or the services described, you do not have to sign this consent
- TelstraSuper will deduct the amount from your super account on the day of the issue of the SOA, or shortly after
- If you have more than one TelstraSuper account you can nominate the account from which the advice fee is to be deducted
- If there are insufficient funds in your nominated TelstraSuper account we will contact you to make arrangements for the payment of the advice fee
- The advice fee will be deducted proportionately from the investment options in which your account is invested (excluding the Direct Access option)
- Your consent expires once the amount is deducted from your TelstraSuper account. To deduct fees from your super account for further advice from TSFP, we will need to obtain your consent again.

You can withdraw your consent to the deduction of fees from your super account by emailing TelstraSuper at [fas@telstrasuper.com.au](mailto:fas@telstrasuper.com.au) or by calling us on 1300 877 526. However, **your withdrawal of this consent must occur before TelstraSuper has deducted the amount from your super account.**

A

## Your information

Title	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Miss	<input type="checkbox"/> Ms	<input type="checkbox"/> Other	<input type="text"/>
Surname	<input type="text"/>			Member number	<input type="text"/>	
Given name(s)	<input type="text"/>			Date of birth	<input type="text"/>	
Residential address (PO Box not acceptable)	<input type="text"/>					
Suburb	<input type="text"/>			State	<input type="text"/>	Postcode <input type="text"/>
Mobile	<input type="text"/>			Contact no.	<input type="text"/>	
Email address	<input type="text"/>					

B

## Advice fee

If you sign this consent, the one-off advice fee that will be deducted from your nominated super account will be:

\$

C

## TelstraSuper account from which advice fee is to be deducted

e.g. TelstraSuper Corporate Plus, TelstraSuper Personal Plus, etc. and the account number

Account	<input type="text"/>	Account no.	<input type="text"/>
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**D****TelstraSuper Financial Planning will provide one-off financial advice**

As part of that advice, TSFP will provide you with a SOA, which covers the following superannuation strategies (Adviser to select all relevant strategies):

- |  |  |
|--|--|
| <input type="checkbox"/> Superannuation contribution advice  | <input type="checkbox"/> The suitability of your existing superannuation arrangements                                  |
| <input type="checkbox"/> Superannuation withdrawal and re-contribution advice                                | <input type="checkbox"/> An assessment of whether you have enough superannuation for your retirement                   |
| <input type="checkbox"/> Superannuation withdrawal advice  | <input type="checkbox"/> Commencement of a Transition to Retirement strategy   |
| <input type="checkbox"/> Nomination of beneficiaries   | <input type="checkbox"/> Commencement of a Retirement income stream  |
| <input type="checkbox"/> Investment Choice recommendations for your superannuation and/or pension account(s) | <input type="checkbox"/> Risk assessment and recommendations relating to the insurances you hold in your super fund(s) |
| <input type="checkbox"/> Other (please specify) <input type="text"/>   |  |

**E****Declaration**

- I declare that I have read the important information section of this form
- I agree to pay the advice fee specified in section B for the personal advice to be provided to me by TSFP
- I provide my written consent to Telstra Super Pty Ltd, the trustee of TelstraSuper, to deduct the advice fee from the TelstraSuper account and pay the advice fee to TSFP on my behalf
- I understand that the balance of my nominated TelstraSuper account will be reduced by the amount of the advice fee deducted
- If I withdraw my consent for the fee to be deducted from my nominated super account, I understand that I will need to pay for this fee from my nominated bank account.

Name 

Signature

X Date **F****Superannuation Fund Details**

TelstraSuper  
Phone 1300 033 166  
Email [contact@telstrasuper.com.au](mailto:contact@telstrasuper.com.au)  
Website [telstrasuper.com.au](http://telstrasuper.com.au)

**G****Adviser Details**Adviser Name 

Telstra Super Financial Planning Pty Ltd  
ABN 74 097 777 725  
AFS Licence No. 218705  
Head Office: Level 10, 130 Lonsdale Street, Melbourne VIC 3000  
Phone 1300 877 526

**Office Use Only**Invoice number Adviser signature Copy of completed form provided to client Date SOA issued **Please return the completed form to:****Email** [fas@telstrasuper.com.au](mailto:fas@telstrasuper.com.au)

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Telephone 1300 877 526

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