



Financial advice fee deduction

Use this form to authorise ElectricSuper to deduct the cost of your financial advice from your super account

1. Your details

Title Mr Ms Mrs Other _____ Date of birth ____/____/____

Given names: _____

Surname: _____

Residential address (required): _____

Suburb _____ State _____ Postcode _____

Postal address (if different): _____

Suburb _____ State _____ Postcode _____

Daytime phone number _____ Mobile number (if different to daytime number) _____

Email address _____

Membership number _____

2. Amount of financial advice fee

Please deduct the amount below from my Accumulation/Pension balance and pay it to the financial adviser nominated in Section 3

Fee \$ _____

The fee requested above must not be more than the amount charged by financial adviser on the attached invoice.

You must attach a copy of the invoice from your financial adviser which shows the fee charged for the financial planning advice you received.

3. Adviser details and declaration

Adviser's name: _____

Adviser's office: _____

Adviser's declaration

I confirm that the personal financial advice fee to be deducted from the member's Accumulation/Pension balance is solely in relation to their super benefits with ElectricSuper.

Signature of adviser: _____ Date: ____ / ____ / ____

4. Sign the form

I understand that:

- the amount to be deducted from my Accumulation/Pension balance is solely in relation to financial advice provided to me
- the fee nominated will be deducted from my Accumulation/Pension balance on receipt of all required information and my account balance will decrease accordingly
- My request may not be actioned where ElectricSuper has been notified of family law proceedings in relation to my super
- My request will not be processed if:
 - I do not have enough money in my Accumulation/Pension balance to cover the advice fee
 - the fee requested at Section 2 is greater than the amount on the invoice from the financial adviser
 - I have completed this form incorrectly or have not fully completed all Sections of this form

Signature: _____

Date: ____ / ____ / ____

Lodge your form

eiss@mercer.com
or
ElectricSuper
Reply Paid 92978
Melbourne Vic 3001

Queries

1300 307 844
www.electricsuper.com.au

Electricity Industry Superannuation Board ABN 57 923 283 236 as Trustee of the Electricity Industry Superannuation Scheme

Disclaimer: The information relating to ElectricSuper is subject to change from time to time. The ElectricSuper Rules (the 'Rules') are the final authority when any discrepancy arises between the Rules and any other information about the scheme. The Electricity Industry Superannuation Board recommends that you consult a licensed or appropriately authorised financial consultant before taking action regarding your superannuation..

Which account will the fee be deducted from?

For Division 5 and Income Stream members, the cost of financial advice will be deducted from your Accumulation or Pension balance.

For Division 2, 3 or 4 (defined benefit) members, the cost of financial advice can only be deducted from the Accumulation Balance (that is, from your additional voluntary contributions or your rollover balances).

Your privacy

Please refer to our website (www.electricsuper.com.au/privacypolicy) for information on how your provided information is used and how we treat your privacy.