

# Application for Spouse membership

Step 1 of this form is to be completed by existing members of ElectricSuper who wish to nominate their spouse for membership of the Accumulation Scheme.

Steps 2 to 10 must be completed by the new spouse member.

If you're unsure of your decisions we recommend that you see a licensed or appropriately authorised financial adviser.

## About this form

We need you to fill out this form to let us know:

- your details
- your investment option(s) for your super
- if you'd like to apply for Death and Total and Permanent Disablement (TPD) cover
- information on nominating a beneficiary for your super.
- your Tax File Number (TFN)
- if you would like to roll in money from another super fund.

## If you need help

For assistance call **1300 307 844** or refer to [www.electricsuper.com.au](http://www.electricsuper.com.au)

### Step 1 - Existing ElectricSuper member to complete

Please print in black or blue pen,  
in uppercase, one character per box.



Member name

\_\_\_\_\_

ElectricSuper member number

\_\_\_\_\_

As a member of ElectricSuper, I nominate my Spouse (named under step 2 of this Application Form) to become a Spouse member of ElectricSuper from the date the trustee receives this Application Form and I agree that contributions will be paid into my Spouse's account as per Step 8 of this form.

Signature

Date

X \_\_\_\_\_

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_



## Step 2 – Personal details of the spouse member

Title Mr  Mrs  Ms   Other \_\_\_\_\_ Date of birth \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
Given names \_\_\_\_\_

Surname \_\_\_\_\_

Home address \_\_\_\_\_

Suburb \_\_\_\_\_

State \_\_\_\_\_

Postcode \_\_\_\_\_

Daytime Telephone \_\_\_\_\_

Mobile number \_\_\_\_\_

E-mail \_\_\_\_\_

## Step 3 – Choose your investment options

I'd like to invest in the following investment option(s):

	Percentages to be invested
Cash	<input type="text"/> %
Conservative Growth	<input type="text"/> %
Balanced Growth*	<input type="text"/> %
High Growth	<input type="text"/> %
<b>Total (must equal 100%)</b>	<input type="text"/> <input type="text"/> <input type="text"/> %

\*Note: If you do not make a selection your Super will automatically be invested in the Balanced Growth option.

## Step 4 - Choose your insurance cover

You only need to complete this section if you want to apply for Death and Total and Permanent Disablement (TPD) insurance cover. I understand that if I don't make a valid choice by selecting one of the options below, I will not be provided with any insurance cover.

I'd like to apply for Death and TPD insurance cover of \_\_\_\_\_ units

Please refer to the Accumulation Scheme (Spouse) - Insurance Benefits flyer for full details of the cover available to you.

Special note: Your insurance cover is subject to the terms and conditions of the insurance policy and acceptance by the Insurer. You will require underwriting before your insurance cover commences. Your selected insurance cover will only commence once the Insurer accepts your application and you are advised of this in writing.

## Step 5 - Your beneficiary nomination

You can nominate who you would like to receive your Death benefit if you die while a member of the ElectricSuper.

For more information about making a binding death benefit nomination call the Helpline or download a 'Making a binding death benefit nomination' form from [www.electricsuper.com.au](http://www.electricsuper.com.au)



## Step 6 - Provide your Tax File Number (TFN)

### Don't pay more tax than you have to – let us know your tax file number.

Your tax file number is confidential and you don't have to give it to ElectricSuper. It is not an offence to not provide your tax file number. However, you may pay more tax than you have to if you don't supply it.

**My tax file number is:** \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

#### Special note:

The Trustee of ElectricSuper is required by law to ask for your tax file number. The Trustee will only use your tax file number for lawful purposes. These purposes may change in the future if there are changes to legislation.

The Trustee may pass your tax file number to any other super fund or account to which your super is transferred in the future unless you request in writing that this not be done.

By providing your tax file number:

- the Trustee will be able to accept all types of contributions made by or for you (some limits may apply);
- you can avoid paying tax at a higher rate than would otherwise apply on your contributions; and
- you can avoid paying tax at a higher rate than would otherwise apply on your benefit, and it will be easier for you to find your super in the future and ensure that you receive all of your super benefits when you retire.

Choosing not to provide your tax file number is not an offence. However, if you don't provide your tax file number now or in the future:

- the Trustee will not be able to accept any after-tax contributions; and
- you may pay more tax on your super benefit than you would otherwise (although you can claim this back when you lodge your tax return).

## Step 7 - Attach proof of spouse's identity

For identification purposes, you **MUST** attach an original certified copy of either your Driver's Licence or Passport (or acceptable alternatives). See the "Completing proof of identity" flyer on the website (at [www.electricsuper.com.au](http://www.electricsuper.com.au)) for details of certification and acceptable alternative documents. Failure to provide appropriate proof of identification may result in delays in the processing of your payment(s).

## Step 8 - Contributions into my spouse account

Contributions will be paid into my spouse account as follows:

**(Select an option)**

**Option 1:** A one-off or regular contribution via payroll deduction by either the existing ElectricSuper member or myself as arranged with our/my payroll office

**Option 2:** An after-tax lump sum contribution\* of

\$ \_\_\_\_\_ paid by Electronic Funds Transfer into ElectricSuper's Bank Account.

I expect the funds to be transferred to the following account effective \_\_\_\_ / \_\_\_\_ / \_\_\_\_

BSB: 085-005

Account no. 583127213

Account name: Electricity Industry Superannuation Scheme

**This transfer must include your full name and/or member number in the reference.**

\*Legislative limits apply to the amount of non-concessional (after-tax) contributions that can be made to ElectricSuper.

**Option 3:** A rollover from my other super into ElectricSuper (see Step 9)



## Step 9 - Rollover spouse's other super money into ElectricSuper

If you have super money with another provider, you can rollover this money into your ElectricSuper Spouse Account - simply complete the details below and we will arrange the transfer for you at no cost.

Name of previous fund or policy

---

Address of previous fund

---

Suburb

State

Postcode

---

Membership or policy number

Approximate value

\$

---

I request that you transfer the total value held in respect of me for the above super fund or policy to the Electricity Industry Superannuation Scheme:

- I understand that on payment by my previous super fund, I discharge that super fund from any further liability in respect of the amount transferred.
- I approve the deduction of any appropriate exit fees from the amount transferred subject to legislative restrictions.
- I request that any further contributions received by my previous super fund after my payment, be redirected to my membership with the Electricity Industry Superannuation Scheme.
- I understand that information contained in this form will be handled by the Trustee of Electricity Industry Superannuation Scheme to process my rollover.
- I understand and consent to my information being collected, disclosed and used in the manner set out in this form.
- I understand that I will receive confirmation once my money has been received in Electricity Industry Superannuation Scheme.
- I understand that I have the right to ask my previous super fund for information that I reasonably require for the purpose of understanding any super entitlements I may have in that fund, including information about any fees and charges that may apply to the transfer and information about the effect of the transfer on any entitlements I have in my previous super fund. I confirm that I do not require such information from my previous fund.

Signature

X

Date / /

## Step 10 - Spouse declaration

Don't forget to sign and return this form to the Scheme's administrator. You should also keep a copy for your records.

By signing this form, I acknowledge that, in addition to the above information, I have read, understood and agree with the following statements:

- I apply to become a member of ElectricSuper on the terms and conditions contained in the Trust Deed and Rules of ElectricSuper. I understand that the Trust Deed and Rules can be inspected on request.
- I have received and read the information provided to me about the Scheme including the Member's Booklet, latest Annual Report and ElectricSuper's Privacy Policy.

Signature

Date

X

/ /

## Step 11 - Return your documents

Please return your completed form (plus any required ID documents) by post only to ElectricSuper, GPO Box 4303, Melbourne VIC 3001. (Forms returned by fax or email will not be accepted.)