

Application form

Personal superannuation

Before you sign this application form, the Trustee or your Adviser is obliged to give you a Product Disclosure Statement (PDS), which is a summary of important information relating to Enterprise Plan. The PDS will help you to understand the product and decide if it is appropriate to your needs.

Please complete this form in BLOCK LETTERS.

Questions? Contact us on 1800 816 575 or service@supermanagers.com.au.

1 Personal details

Member number		Date of birth	
<input type="text"/>	- <input type="text"/>	<input type="text"/>	<input type="text"/>
Title	Given name(s)		
<input type="text"/>	<input type="text"/>		
Surname			
<input type="text"/>			
Occupation			
<input type="text"/>			
Address			
<input type="text"/>			
State		Postcode	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Phone (home)	Phone (work)	Mobile	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Email			
<input type="text"/>			

2 Employment details

Name of employer		Phone number
<input type="text"/>		<input type="text"/>
Address		
<input type="text"/>		
State	Postcode	
<input type="text"/>	<input type="text"/>	
Email		
<input type="text"/>		
Income per annum (refer to the Insurance Guide for a definition of income – Only required if applying for Insurance)	Full time/Casual (No of Hours per week) Only required if applying for Insurance	Date joined employer/ commencement of employment
\$ <input type="text"/>	<input type="text"/>	<input type="text"/>

3 Notification of tax file number

(It is not an offence not to provide your tax file number (TFN). However, if you choose not to, higher tax rates may apply on your superannuation contributions and any benefit received in cash will be taxed at the highest marginal tax rate plus the Medicare levy. I agree to provide my TFN.

TFN

4 Request for internet access

(Allows you to view online your account balance, personal details, investment returns, download forms, etc.)

Yes, I would like to access my superannuation details on the internet.

5 Lost or unclaimed superannuation

I give permission to Enterprise Plan to use my personal information provided (including TFN) to search for any superannuation money held by the ATO or other superannuation funds, to the extent the law allows. Enterprise Plan will contact me and confirm the result of the search, as well as providing transfer documents.

TFN

Member signature

Date

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6 Insurance benefits

Automatic insurance cover options are available as a benefit to Members
(For details - refer to the PDS and Insurance Guide.)

Insurance Options

- I wish to apply for insurance cover within my superannuation membership in Enterprise Plan.

Lump sum death and TPD

Yes No

Income protection

Yes No

If yes, please complete the Enterprise Plan Insurance Application and Variation form, and a personal health statement which are available on the Enterprise Plan website/Forms & Publications www.enterpriseplan.com.au.

Questions? Contact us on 1800 816 575 or service@supermanagers.com.au.

7 Initial contribution/rollover details

Please choose one or more options as applicable.

- My employer will be making superannuation guarantee (SG) contributions to my Member account.
- My employer will make a salary sacrifice or member voluntary contribution on my behalf.
- I will be making a personal contribution/rollover as detailed below

Personal contribution	\$	Are you claiming a tax deduction?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Rollover (estimated)	\$	Number of funds	<input type="checkbox"/> Yes <input type="checkbox"/> No
Other contribution	\$	Have you requested these transfer/ rollovers from the relevant institution?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total	\$		

If Yes to rolling over, please complete a Roll-In form for each fund from which benefits are to be transferred. This form can be downloaded from enterpriseplan.com.au or you can complete the Roll-In form via the Member Online Portal in the Super tab, once you have received your Member Online Log-In and Password.

If you have not already requested the transfer/rollover, please complete a rollover your superannuation into Enterprise Plan form for each superannuation fund (contact us for help or download from the Fund's website).

Do you wish to transfer a benefit from another fund to Enterprise Plan? Yes No

If yes, please complete a Roll - In Form for each fund from which benefits are to be transferred. This form can be downloaded from the Plan's website at enterpriseplan.com.au.

8 Nomination of beneficiaries

In the event of your death, do you wish to nominate one or more beneficiaries to receive the benefit? Yes No

Non-binding nomination

In the event of my death, please pay my superannuation benefit to my estate/dependants as detailed below.

Please pay my benefit to my estate **OR** Please pay my benefit as nominated as follows

Surname	First name	Relationship	% of benefit
			%
			%
			%
			%
		Total	%

This nomination is not binding on the Trustee although the Trustee will have regard to any nomination(s) made when deciding how your death benefit should be paid. You may change your nomination(s) at any time by writing to us.

Nomination of beneficiary – binding

If you would like to make a nomination that is binding on the Trustee, please complete the Nomination of Beneficiary form. The Nomination of Beneficiary Factsheet at www.enterpriseplan.com.au provides further information or contact us on 1800 816 575 or download the form from enterpriseplan.com.au.

9 Your investments

This section of the application should be used to advise the Trustee of your chosen investment options within Enterprise Plan Personal Product. You can select as many investment options as you wish but they must add up to a total of 100% of the amount invested. Please refer to the Enterprise Plan Personal Product PDS and Investment Guide or your financial adviser for further information about investment options.

Please note: If you wish to join the Personal Product from 1 July 2017, you must make an investment choice when you complete and submit your application form. If you do not make an investment choice, the Trustee will reject your application and refund your monies.

I wish to invest in one or more of the following investment options (please tick the appropriate investment(s) and indicate either a percentage or your investments **OR** a dollar value).

Tick	Investment option	Percentage (whole numbers only, no decimal places)	OR \$ Value
Risk band 1 – Very low risk			
<input type="checkbox"/>	Enterprise Plan Cash	%	\$
Risk band 2 – Low risk			
<input type="checkbox"/>	Enterprise Plan Diversified Fixed Interest	%	\$
Risk band 3 – Low to medium risk			
<input type="checkbox"/>	Enterprise Plan Conservative	%	\$
Risk band 4 -			
<input type="checkbox"/>			
Risk band 5 – Medium to high risk			
<input type="checkbox"/>	Enterprise Plan moderate	%	\$
Risk band 6 – High risk			
<input type="checkbox"/>	Enterprise Plan Balanced MySuperMyLife	%	\$
<input type="checkbox"/>	Enterprise Plan Growth	%	\$
<input type="checkbox"/>	Enterprise Plan Australian Shares	%	\$
<input type="checkbox"/>	Enterprise Plan Aggressive	%	\$
<input type="checkbox"/>	Enterprise Plan International Shares	%	\$
<input type="checkbox"/>	Enterprise Plan Listed Property	%	\$
	TOTAL	100%	\$

10 Declaration

- I hereby make application to join the Enterprise Plan and agree to be bound by the Trust Deed and rules of Enterprise Plan, as amended from time to time;
- I declare that all the information on this application is true and correct and that I have read and understand my Duty of Disclosure (refer to the Insurance Guide);;
- I consent to the Trustee supplying information to my Adviser (including electronic access through Enterprise Plan Administration) shown on this application form, his/her dealer group and/or the Promoter;
- I have received personally the PDS either as a printed document, an electronic document or a paper printout of the electronic document and this application was accompanied by, or attached to, the PDS at the same time I received this application form. I have read and understood the PDS; I agree to access the Information in the PDS prior to making decisions in relation to my Enterprise Plan Employer Super membership;
- I acknowledge that neither the Trustee, the Promoter, nor any of their subsidiaries nor their respective officers guarantees any particular rate of return, the capital invested nor the repayment of capital;
- I understand that my investment instructions will be processed after this form is accepted by the Trustee in accordance with the unit price applicable at that time and I understand that a buy/sell spread may apply to any investment options that I have selected;
- I understand that the Trustee reserves the right not to accept my request if, in its opinion, my investment instructions are not clear, and I understand that the Trustee can change the underlying fund managers or products in the investment options at any time;
- I agree to receive all information required or permitted to be given to me under SIS and the Corporations Act, including ongoing notifications, product disclosure statements and supplementary product disclosure statements (or the equivalent information) in respect of the investment options (Information):
 - where it is or may become permissible under the Corporations Act, via my Adviser appointed in writing or notice by email or other electronic communication (including online); or
 - directly; or by email (including emails containing a hypertext link); by other electronic communication (including online by accessing enterpriseplan.com.au); or by making an application to become an investor or by participating in Enterprise Plan Employer Super;
- I understand and accept that a period longer than 30 days may be required to rollover or transfer all or part of my withdrawal benefit where the investment options I have chosen are illiquid and that a list of illiquid investments, the nature and reason for the illiquidity and the estimated maximum redemption period is set out at the Plan's website enterpriseplan.com.au
- I acknowledge and have read the privacy policy (refer to the Member Guide) and understand by completing and returning the relevant forms, I agree to the Trustee using and disclosing my personal information as set out in the privacy policy. I acknowledge and understand that the Promoter may also use the information from time to time to provide me with news or offers about products or services that are offered by the Promoter. If you do not wish to receive this service, please indicate by ticking the box at the bottom of this form;
- I have read and understood the conditions of tax file number collection (refer to the Member Guide);
- I acknowledge that the Trustee cannot provide me with advice about my benefits, investments, insurance and any taxation implications that takes into account my personal circumstances and that I should speak to an appropriately qualified adviser if I require such advice; and
- I acknowledge that the Trustee may be required under taxation and superannuation legislation to deduct additional tax from my benefits and refuse or refund contributions made by me or on my behalf and, in doing so, may make any adjustments to my account it considers necessary or appropriate.

Signature

Date

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I do not wish to receive news or offers about products and services by the Promoter.

Please send the completed form to: Enterprise Plan, PO Box 1282, Albury NSW 2640

Contact us

Phone: 1800 816 575

Email: service@supermanagers.com.au **Website:** enterpriseplan.com.au

The information in this document has been prepared by OneVue Super Services Pty Ltd ABN (74 006 877 872), AFSL 246883 as the Fund Administrator. It is intended to provide you with general information only and does not take into account your personal objectives, financial situation and needs. Before making any decisions regarding your benefits in **Enterprise Plan sub Fund of the Executive Super Fund** ABN 60 998 717 367 (the Fund) it is important that you consider the current Product Disclosure Statement (PDS) relevant to your category of membership having regard to your own situation and needs. Copies of the various PDS' are available on the Enterprise Plan's website www.enterpriseplan.com.au. You should consult a licensed or authorised financial adviser if you require advice that takes into account your personal circumstances.