catholic super

Catholic Super
Personal Plan Member Application

About this form

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

- your details
- which investment options you'd like your money invested in
- your tax file number

To find the information you need to complete this form you should read the current Product Disclosure Statement (PDS) available at **www.csf.com.au/super-pds** or call **1300 655 002**.

Once you've finished the form, don't forget to sign it and return it to Catholic Super.

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

Note: You should complete this form if you do not have superannuation contributions made by an employer or if you are joining as a Spouse Member.

Step 1 – Complete your personal details

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

Title Mr ◯ Mrs ◯ Ms ◯ Miss ◯ Other ☐☐☐ Date of birth ☐☐ / ☐☐ / ☐☐☐☐

Given names

Surname

Residential address (**must be provided**)

Suburb State Postcode

Postal address (if different to above)

Suburb State Postcode

Daytime Telephone ☐☐ - ☐☐☐☐☐☐☐☐ Mobile ☐☐☐☐ ☐☐☐☐☐☐

Fax ☐☐ - ☐☐☐☐☐☐☐☐

E-mail - see note below

Providing your email address

The Trustee anticipates providing information such as annual reports, member statements, exit statements and notices of any material changes or occurrence of significant events electronically, rather than in written form as we do at the moment. If this format becomes available and you'd like to receive this information electronically please advise your email address.

Issued by CSF Pty Limited ABN 30 006 169 286; AFSL 246664 as Trustee of the MyLifeMyMoney Superannuation Fund ABN 50 237 896 957.

Step 2 – Make a contribution

If you'd like to build wealth faster you can contribute too

Only complete this section if you want to contribute.

I would like to contribute $ ___,___ as an after-tax contribution*

○ I wish to make this payment by cheque. Please make the cheque payable to Catholic Super

Cheque number

* Legislative limits apply to the amount of non-concessional (after-tax) contributions that can be made to Catholic Super as a single payment. If your contribution exceeds those limits, the excess will be returned to you.

I declare that (***please*** ✓ ***tick one box only***)

○ I am under age 65

○ I am aged 65 - 74 and have been in paid employment for at least 40 hours in a period of not more than 30 consecutive days during this financial year.

Step 3 – Choose your investment options

Take control of how your super is invested

You can choose one or more investment options. Please ensure the total adds to 100% otherwise the default investment option will apply until it's corrected.

If you don't make a selection you'll automatically be invested in the default investment option which is the Balanced option.

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

	Percentage to be invested
Managed Choice options	
Aggressive	%
Moderately Aggressive	%
Balanced (MySuper product)	%
Conservative Balanced	%
Moderately Conservative	%
Conservative	%
RetirePlus	%
RetireStable	%
Build Your Own options	
Australian Shares	%
Overseas Shares	%
Property	%
Diversified Fixed Interest	%
Cash	%
TOTAL	**1 0 0 %**

Step 4 – Your insurance cover

You may apply for Death only cover or Death and Total & Permanent Disablement (TPD) cover. If you are employed, you may be eligible to apply for Income Protection cover.

The cost of premiums will vary each year according to your age and the level of cover you choose. Refer to the Insurance tables in the **Insurance guide** available at **www.csf.com.au/super-pds**.

If you wish to apply for insurance cover, please complete the *Adjusting your Insurance Cover* form available on our website **www.csf.com.au**. Your cover will be subject to acceptance by the Insurer and confirmation in writing from Catholic Super.

Step 5 – Making a binding death benefit nomination

If you wish to make a binding death benefit nomination you will need to complete the *Binding Death Benefit Nomination* form available from our website **www.csf.com.au**.

Step 6 – Provide your tax file number

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 Catholic Super. 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 is required by law to ask for your tax file number. By providing your tax file number, you're allowing the Trustee to use it to:

- find or identify your super when there's no other way
- work out any tax payable
- pass your tax file number to the tax office when you receive your super payout or have unclaimed super money after reaching pension age
- pass your tax file number to any other super fund or account to which your super is transferred in the future, unless you tell the Trustee in writing not to do so
- report details of contributions to the tax office for working out whether any tax is applicable if contributions for you exceed certain limits, and
- where required by law, pass your tax file number to other Government agencies.
- If you don't provide your tax file number, now or later:
- you may pay more tax on contributions made by your employer and certain other contributions made by or for you. In some circumstances, you may be able to claim this back, however time limits and other rules may apply
- the Trustee will only be able to accept contributions made for you by your employer. No other contributions, for example, after-tax contributions, can be accepted
- you may pay more tax on your super benefit that you would otherwise (although you can claim this back when you lodge your tax return), and
- it may be more difficult to find your super in the future if your change your address without notifying the Trustee or if you rollover any other super accounts you may have.

The legal purposes for which the Trustee can use your tax file number and the consequences for not quoting your tax file number may change in the future.

Date of birth ☐☐/☐☐/☐☐☐☐

Your name

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Your Privacy

The Fund is administered by us along with our service provider, Mercer Outsourcing (Australia) Pty Ltd. We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information about the other products and services offered by us and our related companies. If you do not wish to receive marketing material, please contact us on **1300 655 002**.

Our Privacy Policies are available to view at **www.csf.com.au** or you can obtain a copy by contacting us on **1300 655 002**.

If you do not provide the personal information requested, we may not be able to manage your superannuation.

We may sometimes collect information about you from third parties such as your employer, a previous super fund, your financial adviser, our related entities and publicly available sources.

We may disclose your information to various organisations in order to manage your super, including your employer, our professional advisors, insurers, our related companies which provide services or products relevant to the provision of your super, any relevant government authority that requires your personal information to be disclosed, and our other service providers used to assist with managing your super.

In managing your super your personal information will be disclosed to service providers in another country, most likely to Mercer's processing centre in India. Our Privacy Policies list all other relevant offshore locations.

Our Privacy Policies set out in more detail how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact us on **1300 655 002** or write to the Catholic Super Privacy Officer, GPO BOX 4303, Melbourne, VIC 3001.

Step 7 – Declaration and signature

By signing this form I:

- have read and understood Catholic Super's Product Disclosure Statement, as currently available at **www.csf.com.au/super-pds**.
- have read Catholic Super's Privacy Policy. I understand and consent to my personal information being collected and used by Catholic Super in accordance with this statement.
- agree to be bound by the terms and conditions of the Trust Deed governing the fund.
- Acknowledge the statements above, and the information that I have provided as part of this application, are true and complete to the best of my knowledge.

Signature

✗

Date

/ /

Please return your completed form to Catholic Super, GPO Box 4303, Melbourne, VIC 3001.