

Adviser service fee one-off consent form



How to use this form

Consent to the deduction of one-off adviser service fees can be provided by completing this form. Please read the form carefully to ensure this accurately reflects your agreement with your adviser.

Speak to your adviser if you have any questions regarding the arrangement or contact us on 1300 360 988 or mail@firstsuper.com.au

Unless otherwise indicated, all sections of this form must be completed.

You can

- **use this form for multiple fees and multiple accounts:** If you need to apply the same fee type to multiple accounts i.e. one-off fee to both Pension and Super accounts, just duplicate the pages that apply to the fee.

You cannot

- **use this form to apply or change fixed-term fees:** Use the standalone fixed term adviser service fee form for fixed-term fees.

Adviser service fee

Important information

Fee arrangements

If you request for a specific dollar amount to be charged to your account, that amount will be deducted. Please refer to the Statement of Advice for more information.

Your investment option to pay the advice fees

Please note: the investment option you selected must have sufficient funds to pay the fee.

Please complete this form with **CAPITAL** letters and a blue or black pen.

Section 1 | Member details

Title (Mr, Mrs, Miss etc)

Date of birth (DD/MM/YYYY)

Surname

Given name(s)

Telephone

Email address

Please note your account details will not be updated using this form, to update your account details, please log into **firstonline**, call us or complete a Change of Details form, available at firstsuper.com.au/forms.

Section 2 | Adviser details (provider of financial product advice to complete)

Use this space to identify the Authorised Representative or Corporate Authorised Representative where applicable.

Adviser details and contact information is required.

Adviser name

Dealer Group name

Dealer ID

Adviser ID

Telephone

Email address

One-off adviser service fee

Section 3 | Account for the adviser service fee to be paid from

Account number

☐ Super ☐ Pension

Section 4 | Adviser service fee amount

Dollar (\$)

I confirm I have read and agree the fees comply with the information as contained in the Licensee Terms.

Section 5 | Services to be provided for above fees

This section is mandatory for super and pension accounts.

Please select the service(s) that you will be entitled to receive under the arrangement with your adviser. For Super/Pension accounts, at least one option must be selected and the services must relate to personal financial advice about your interest in the fund (including relevant insurance or investments). Services should be considered in relation to the proportion of fees being charged.

- ☐ Review and/or establishment of accounts and/or consolidation of member benefits into First Super accounts
- ☐ Contributions made to First Super accounts
- ☐ Selection of investment options/asset allocations within First Super accounts
- ☐ Superannuation insurance strategies and/or claims on superannuation insurance
- ☐ Withdrawal advice including pension payments and/or Centrelink entitlements related to First Super accounts
- ☐ Tax advice related to either contributions, income payments, cash flow projections, withdrawals or death benefit payments related to First Super accounts
- ☐ Choice of beneficiary nomination (binding nomination or reversionary beneficiary) to First Super accounts.

First Super may request a copy of the Statement of Advice or Record of Advice for verification purposes. This request will be submitted to your Financial Planner/ Adviser or the financial planning practice. Please refer to the consent declaration.

Section 6 | Consent (to all adviser service fees outlined in this form)

Declaration

I/we confirm that:

- the adviser service fee agreed is in accordance with the terms of an arrangement entered into with the adviser and/or their licensee, and
- have read the Statement of Advice and the Product Disclosure Statement and understand the requirements for adviser service fees to be deducted from my account
- I/we provide authority and consent to the financial planner/ adviser, or the financial planning practice, to provide a copy of the Statement of Advice or Record of Advice if requested by First Super or their administration service provider.
- I acknowledge that the deduction of the advice service fee may reduce my superannuation balance at retirement and beyond, as opposed to the fee not being deducted.

This fee consent does not become invalid if:

- you as the account holder change your name after consenting to the one-off fee arrangement using this form; or
- the adviser you have nominated as the provider of financial product advice under the one-off fee arrangement changes their name and/or contact details.
- your adviser or licensee's rights under the one-off fee arrangement are transferred to another adviser or licensee, provided the arrangement is otherwise unchanged.

Member acknowledgment

Name

Signature

Date (DD/MM/YYYY)

Name

Signature

Date (DD/MM/YYYY)

What happens next?

I've given my consent

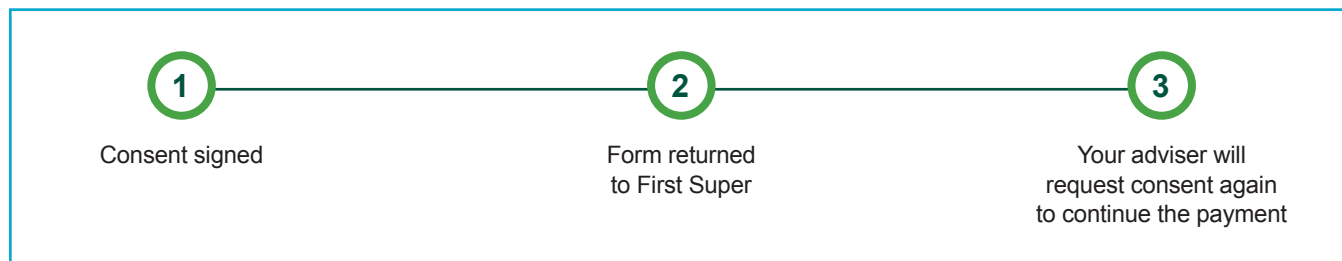
Where you have sufficient funds in your account(s) the fees will be deducted on the first day of the month after we receive a validly completed form and supporting documents, and approval is obtained from the Trustee (First Super).

About withdrawing consent

If you wish to withdraw your consent to the above fee, you should discuss with your adviser as this may affect the advice and related services they provide to you.

If you withdraw your consent by notifying your adviser, they are generally required to contact us within 10 business days.

You can also contact us directly to withdraw your consent or with any other questions on 1300 360 988. First Super will generally process your request within 3 business days of it being received. Your adviser will remain connected to your account unless otherwise specified.



Please return this completed form by:

 First Super, PO Box 666, Carlton South, VIC 3053

 mail@firstsuper.com.au

Want to know more? We're here to help.

 1300 360 988

 mail@firstsuper.com.au

 Download the First Super app to manage your account

 firstsuper.com.au

