

max Super Fund Application Form

max Super Fund (the Fund) is a sub-plan of OneSuper ABN 43 905 581 638 RSE R1001341 (formerly Smartsave 'Member's Choice' Superannuation Master Plan) (the Fund). The Fund is issued by Diversa Trustees Limited ABN 49 006 421 638 AFSL 235153 RSE Licence No L0000635 (referred to as we, our, us, the Trustee).

IMPORTANT INFORMATION. Before completing this form you must read the max Super Fund Product Disclosure Statement (PDS) dated 13 January 2021.

Please complete this form in BLOCK LETTERS. Questions? Call us on 1300 629 787 or email maxteam@onevue.com.au.

Personal Details

Title Surname

Given Name(s)

Date of Birth

Gender ☐ Male ☐ Female ☐ Indeterminate/Unspecified /Intersex

Tax File Number (It is not compulsory to quote your TFN)

☐ My Tax File Number is:

I understand that this information will be used strictly for the purpose of compliance with Australian Federal taxation laws and will, if appropriate, be forwarded to the Australian Taxation Office (ATO).

☐ I do not wish to provide my Tax File Number. I understand the consequences of not providing my TFN.

Address Details

Residential Address

State Postcode

Postal Address (if same as Residential Address write "as above")

State Postcode

Contact Details

Phone (home)

Phone (work)

Phone (fax)

Phone (mobile)

Email

Employment Details

Employment Status

☐ Full-Time

☐ Part-Time

☐ Permanent Part-Time

☐ Casual

☐ Employee Of Your Own Company

☐ Not Employed (go to Your Investment Choice)

☐ Self-Employed /Substantially Self-Employed

Occupation

Business / Company Name

Employer Postal Address

State

Postcode

Employer Phone

Employer Fax

Date You Joined Your Employer

D

D

/

M

M

/

Y

Y

Y

Y

Are You Currently In Active Employment*?

☐ Yes

☐ No

*Active Employment means you are gainfully employed (including being on Employer approved leave except leave caused by illness or injury) and attending work and performing your normal duties and hours without restriction due to illness or injury.

Your Investment Choice

max Super Fund offers twelve (12) investment options. Please nominate the investment option/s you wish to invest in. You can select one option, or a combination of options, however your total nomination must equal to 100%.

Option Name		Option Name		Option Name		Total
Cash	%	Moderate	%	Australian Shares	%	100%
Conservative Income	%	Balanced	%	International Shares	%	
Income	%	Growth	%	Listed Property Securities	%	
Conservative	%	Australian Fixed Interest	%	Ethical Shares	%	

Death Benefit Nomination

In the event of my death, I request the Trustee of the max Super Fund to distribute my benefit as set out below. Please select one of the below options:

☐ Non-Binding Nomination: I understand that my nomination is not binding on the Trustee of max Super Fund

	Beneficiary Name	Relationship	Proportion
1			%
2			%
3			%
4			%
Total Proportion			100%

☐ Binding Nomination: Please complete a Binding Death Benefit Nomination Form (available at www.onesuper.com.au/funds/max-super)

☐ I do not wish to make a Death Benefit Nomination

Privacy Policy

The collection of your personal information (PI) in this form is governed by the Privacy Act 1988 (Cth). OneVue Wealth Services uses your PI to administer your superannuation account (including insurance (if any)), improve our products and services and keep you informed. If we cannot collect this information, we may not be able to do these tasks. We may collect your PI from you, or from third parties such as your employer. We will only share your PI where necessary to perform our activities with our administrator, other service providers, as required by law or court/tribunal order or with your permission. Your PI may be accessed overseas by some of our service providers. For full details of how we use your PI, the countries where your PI may be accessed, how you can access and change your PI, and the privacy complaints process please read our Privacy Policy on the Secure Online Portal, or at onesuper.com.

Declaration

By completing this application, you confirm that:

- You have read and understood the max Super Fund PDS dated 13 January 2021 (including the Additional Information Guide, and the Insurance Guide) and have received an electronic or paper copy.
- You understand the information on the terms of the insurance cover contained in the PDS and Insurance Guide and has considered your insurance needs.
- You apply to become a member of max Super Fund – Accumulation Account.
- You declare that all of the details in this application are correct.
- You consent to the collection and disclosure of personal information for the purposes outlined in the Privacy Policy.
- You understand that if you do not wish to access the online facility for communications and prefers paper communications, you must notify the Trustee of this preference.
- You understand the conditions required to be eligible for insurance cover, as outlined in the max Super Fund Insurance Guide.
- You choose not to be inactive and to continue your Account even if your balance falls below \$6,000.
- Upon acceptance of this application, you agree to be bound by the provisions of the Trust Deed dated 26 November 2020 as amended from time to time, which relates to max Super Fund.
- You have read, understood and accept the terms and conditions applying to the Online Order Pad, as outlined in the max Super Fund Additional Information Guide.
- You acknowledge that the Promoter Fees specified in the max Super Fund PDS, will be collected by the Promoter up to a maximum of:
 - 0.33% p.a. for the Passive Growth MySuper Investment Option paid from the Administration fees.
 - 0.773% p.a. for all Investment Options except for the Passive Growth MySuper Investment Option paid from the Administration fees.
- You acknowledge that the max Super Fund PDS discloses that the Promoter consents to this arrangement for the payment of the Promoter Fees.

Signature

Date

D

D

/

M

M

/

Y

Y

Y

Y

max Super Fund USI 43 905 581 638 017 ABN 43 905 581 638 is a sub-plan of OneSuper ABN 43 905 581 638 RSE R1001341 (formerly Smartsave Members Choice Superannuation Plan). The max Super Fund Product Disclosure Statement is issued by Diversa Trustees Limited ABN 49 006 421 638, AFSL No 235153 RSE Licence No L0000635 the Trustee of max Super Fund and OneSuper.