

Advice fee request

Important Note: Please provide us with as much information as possible. Please tick box where appropriate. Use **BLOCK** letters and dark ink when completing this form and ensure it is signed and dated. *DENOTES MANDATORY FIELD.



☎ 13 11 84 📍 [sunsuper.com.au](https://www.sunsuper.com.au)
Reply Paid 2924 Brisbane Qld 4001

Member number

1 Personal details (Sunsuper member)

Title	First name*	Middle name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Last name*	Date of birth (DD/MM/YYYY)*	Gender
<input type="text"/>	<input type="text"/>	<input type="text"/> M <input type="text"/> F
Street Address / PO Box*		
<input type="text"/>		
Suburb/Town*	State*	Postcode*
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email address* <i>We need this so we can send you notifications about any advice fees</i>		
<input type="text"/>		
Home phone number	Mobile phone number	
<input type="text"/>	<input type="text"/>	

2 Adviser details

Full name*	ASIC financial adviser register number*
<input type="text"/>	<input type="text"/>
Licensee	AFSL No.*
<input type="text"/>	<input type="text"/>

3 Adviser Licensee Details To be completed by the Financial Adviser

Sunsuper Superannuation Fund makes payment of the advice fee to the financial adviser's Licensee (AFSL), and will provide the Licensee with a Recipient Created Tax Invoice (RCTI). In order to make payment, we will require the Licensee's bank details as well as a signed agreement from them. In the event we don't already have our Licensee's details on file, please provide the below contact details for your Licensee:

Email address	Phone number
<input type="text"/>	<input type="text"/>

➔ Please continue over page

4 Advice fee request instructions To be completed by the Financial Adviser

Details of the entity paying the advice fee, and providing the RCTI:

Sunsuper Superannuation Fund ABN: 98 503 137 921, 30 Little Cribb St, Milton QLD 4064

Due to the nature of an RCTI, where SunsUPER agrees to pay the advice fees the Licensee will not be able to issue a tax invoice to the member in respect to the advice fees detailed on this form.

Initial/One-off advice fee (including 10% GST)

Initial/One-off advice fees payable to a Licensee in respect of a month will be paid on the 15th of the next month, or as soon as possible thereafter.

If you wish the Initial/One-off advice fee to be paid separately before the next 15th of the month, please tick here:

Ongoing advice fee (including 10% GST) please provide the monthly amount

 Per month for

Ongoing advice fees payable to a Licensee in respect of a month will be paid on the 15th of the next month, or as soon as possible thereafter.

^Ongoing advice fee is payable for no longer than 24 months, and if number of months is not provided it will default to 24 months.

Payment of the Initial/One-off Advice Fee and Ongoing Fees is subject to the Adviser Registration Terms and Conditions at sunsuper.com.au/advisers/adviser-online-terms-and-conditions as varied by SunsUPER from time to time.

For more information about SunsUPER's policies, requirements and obligations in relation to payment of advice fees, go to 'Advice Fee Request FAQs' at sunsuper.com.au/advisers/advice-fees/payment-of-fees-and-faqs.

Important

SunsUPER will not pay an advice fee if the member's account would be less than \$3,000 after the debit for the advice fee. Advice fees cannot be paid under an *Advice fee request* where a member holds only a defined benefit or lifetime pension.

5 Member authorisation and declaration

- I understand that authorising an advice fee request means that the advice fees detailed on this form will be debited from one of my SunsUPER accounts.
- I understand that advice fees can only be debited from my SunsUPER account for advice related to my interest in SunsUPER Superannuation Fund.
- I acknowledge and accept that SunsUPER reserves the right to decline payment of this advice fee request at any time.
- I understand that I am able to discontinue any advice fee at any time by notifying SunsUPER.
- I provide my consent for SunsUPER to obtain, on request at anytime, a copy of my advice document from my Financial adviser in relation to this advice fee request.

Member to sign here*

Date (DD/MM/YYYY)*

6 Adviser declaration

- Neither I, nor my Licensee, will issue a tax invoice to the member in respect to the advice fees detailed on this form.
- I confirm the advice fees are solely to pay for advice services related to the member's interest in the SunsUPER Superannuation Fund.
- I have read and agree to the Adviser Registration Terms and Conditions available at sunsuper.com.au/advisers/adviser-online-terms-and-conditions.
- I acknowledge and accept that SunsUPER reserves the right to decline payment of this advice fee request at any time.
- I understand that the member can discontinue the advice fee, at any time.
- I will provide a copy, on SunsUPER's request, of the member's advice document in relation to this advice fee request at anytime.

Adviser to sign here*

Date (DD/MM/YYYY)*

 Please return the form to us via email to adviser_services@sunsuper.com.au

We are committed to respecting the privacy of personal information you give us. If you would like a copy of SunsUPER's Privacy Policy, visit sunsuper.com.au/privacy or call 13 11 84.

Sunsuper Pty Ltd ABN 88 010 720 840 AFSL No. 228975 Trustee of the SunsUPER Superannuation Fund ABN 98 503 137 921 MySuper Authorisation 98 503 137 921 996