

# Sunsuper for life Business Membership Application

Use this form to apply to open a *Sunsuper for life Business Super-savings account*

**Important:** Before completing this form please ensure you read and understand your Duty of Disclosure located at [sunsuper.com.au/dutyofdisclosure](http://sunsuper.com.au/dutyofdisclosure)

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

**Member number**  
if already a member

## 1 Personal details

Title  First name\*  Middle name

Last name\*  Date of birth (DD/MM/YYYY)\*  Gender\*  M  F

Street address/PO Box\*

Suburb/Town\*  State\*  Postcode\*  Home phone number  Daytime phone number\*

Personal email address  Mobile phone number\*

NOTE: Where we can we'll provide your documents, including statements and notices of changes to your account, electronically. We'll email or SMS you when information is ready to view in *Member Online*. If you would prefer information is posted to you, change your preferences in *Member Online*, the Sunsuper app, or by contacting us.

**Tax file number (TFN) details** – Sunsuper can use your TFN to help you bring your super together. Read the information about *Providing your TFN* on the following page.

My TFN   **Look for other super for me**  
By ticking this box, you consent to Sunsuper using the Australian Taxation Office (ATO) SuperMatch service to use your TFN to search for any other super you may have. This super may be with other super funds or held with the ATO. If we find money with the ATO, you also consent to Sunsuper requesting the ATO transfer these amounts into your Sunsuper account where possible. If we find money with other super funds, you'll have the choice of whether you transfer this or not. To help keep track of your super, we'll also conduct an ongoing annual search on your behalf. If at any time you wish to revoke your consent, please contact Sunsuper on 13 11 84.

Employer's trading name – Your employer's company name may be different from its trading name. Please ensure you provide the trading name.  Employer's Sunsuper no. (if applicable)

Date you joined employer (DD/MM/YYYY)\*  Employer's phone number  Your occupation

## 2 Preferred beneficiaries

You can make a binding death benefit nomination by completing a *Binding death benefit nomination* form instead of the section below. A binding nomination is a legal instrument that 'binds' the Trustee of Sunsuper to pay your death benefit to your nominated beneficiaries in most cases. For more information or if you would like a *Binding death benefit nomination* form visit [sunsuper.com.au/beneficiary](http://sunsuper.com.au/beneficiary). You can also nominate a reversionary beneficiary when you open an *Income account*. Refer to the *Sunsuper for life guide* for details.

**You can add or change your nomination at any time using *Member Online* or the Sunsuper app.**

I nominate the people below as my preferred beneficiaries for the payment of my death benefit from my *Super-savings account*. I understand my preferred nomination will be used by Sunsuper as a guide only and that Sunsuper is not bound by my nomination when exercising its absolute discretion to pay my death benefit.

Given names	Surname	Date of birth	Gender	Relationship	Portion of benefit
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> M <input type="radio"/> F	<input type="text"/> (e.g. spouse)	<input type="text"/> %
Given names	Surname	Date of birth	Gender	Relationship	Portion of benefit
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> M <input type="radio"/> F	<input type="text"/> (e.g. spouse)	<input type="text"/> %

If more beneficiaries are required please attach details separately.

Must add up to TOTAL **100.00%**

➔ Please continue over page

### 3 Your insurance cover

**Important:** Refer to your *Sunsuper for life Business Product Disclosure Statement (PDS)* and *Insurance guide*, available at [sunsuper.com.au/pds](https://www.sunsuper.com.au/pds) for insurance details. Standard cover is Death and Total & Permanent Disability Assist cover as described in the *PDS*. The commencement of Standard cover is dependent on a Superannuation Guarantee (SG) contribution being received from your employer. Limited Cover and an At Work requirement will apply.

#### 3A Standard cover

Select 1 of the following 2 options

\*If you do not select an option, the default will be applied.

1. I would like Standard cover to start once I attain age 25 and reach an account balance of \$6,000<sup>1</sup>  
**skip to section 4**

2. I would like to opt-in to Standard cover regardless of my age and account balance<sup>1</sup> **continue to 3B**

<sup>1</sup> Other eligibility conditions apply. For full details of eligibility and information on when cover starts and stops, refer to the *Sunsuper for life Business Insurance guide*.

Default option

Note: If you don't want Standard cover with Sunsuper, please contact us.

#### 3B Additional cover

You can apply for Additional cover at any time. Simply complete the *Change of insurance cover* form available on your employer's microsite or apply online at [sunsuper.com.au/business](https://www.sunsuper.com.au/business)

### 4 Your investment choice

Your *Super-savings account* balance will be invested in the Lifecycle Investment Strategy. For more information on our wide range of investment options visit [sunsuper.com.au/business](https://www.sunsuper.com.au/business) for a copy of the *Sunsuper for life Investment guide*. You can easily change your investments via *Member Online* or the Sunsuper app.

### 5 Your privacy - Personal information collection notice

The purpose for which Sunsuper is collecting the information on this *Membership application* is to provide superannuation benefits and related services for you. This includes processing your application, managing your participation in Sunsuper and ensuring you receive your entitlements. If the information requested is not provided, Sunsuper may be unable to properly administer your benefits and notify you about your entitlements. Sunsuper will normally only use the information you provide on this application for these purposes.

Sunsuper will also use this information to notify you about Sunsuper and other products. Sunsuper does not normally disclose information about members to parties outside the Sunsuper group, except parties contracted to provide services to Sunsuper. This includes but is not limited to the Fund's administration service provider, insurer, auditors and legal advisers.

If you subsequently make a claim for a disablement benefit, the insurer will disclose information about you to medical practitioners and other experts for the purposes of assessing your claim, and may collect information about your disability from these people or from your employer. Sunsuper also might be required by law to disclose information about you, for example to Government bodies such as the Australian Taxation Office, and we may disclose information to relevant overseas bodies in various countries, as described in our *Privacy Policy*.

Our *Privacy Policy* sets out how you can access information about your benefit and personal details, correct any information which is inaccurate or out-of-date and information on our privacy complaints process. 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](https://www.sunsuper.com.au/privacy) or contact us.

### 6 Authorisation and declaration Sign this application form and return to Sunsuper:

#### Providing your Tax file number (TFN)

Under the *Superannuation Industry (Supervision) Act 1993*, your superannuation fund is authorised to collect, use and disclose your tax file number.

The trustee of your superannuation fund may disclose your tax file number to another superannuation provider, when your benefits are being transferred, unless you request the trustee of your superannuation fund in writing that your tax file number not be disclosed to any other superannuation provider.

Declining to quote your tax file number to the trustee of your superannuation fund is not an offence. However giving your tax file number to your superannuation fund will have the following advantages:

- your superannuation fund will be able to accept all permitted types of contributions to your account/s,
- other than the tax that may ordinarily apply, you will not pay more tax than you need to - this affects both contributions to your superannuation and benefit payments when you start drawing down your superannuation benefits, and
- it will make it much easier to find different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

#### I declare that:

- I apply to become a member of Sunsuper and I agree to be bound by the Trust Deed that governs the Fund.
- I apply to open a *Super-savings account*.
- I acknowledge and have read my Duty of Disclosure and all of my details on this *Membership application* are correct.
- I have received, read and accept the accompanying *Sunsuper for life Business PDS*. I understand that other important information which forms part of the *PDS* is contained in the *Sunsuper for life guide*, *Sunsuper for life Business Insurance guide*, the *Plan information factsheet* and *Sunsuper for life Investment guide* and that the *PDS* should be read in its entirety.
- I understand all the conditions I must meet to be eligible to obtain Standard cover, as described in Section 3 of the *Sunsuper for life Business Insurance guide*. I acknowledge insurance cover is provided by an external insurance company.
- By signing this *Membership application*, I consent to the collection and disclosure of information about me for the purposes shown above.

If you would like to change your investment or insurance options to suit your needs or you would like to receive a copy of the *Sunsuper for life guide*, *Sunsuper for life Business Insurance guide* or *Sunsuper for life Investment guide* please visit [sunsuper.com.au/business](https://www.sunsuper.com.au/business) or contact us.

Member to sign here\*

Date (DD/MM/YYYY)\*

Please return the form to Sunsuper via [sunsuper.com.au/contact-us](https://www.sunsuper.com.au/contact-us) OR Reply Paid 2924 Brisbane Qld 4001

### 7 Employer use only (if required)

Payroll ID

Location

Date joined employer

Date eligible to join Sunsuper

Annual salary

Employment status

FT  PT  Casual  Contractor

Category / Department

Average hours worked per week

Under 15 hours  Over 15 hours

Sign here on behalf of employer

Full name of signatory

Date signed