

Ongoing Advice Service fee Consent variation or withdrawal

Complete and sign this form to:

- Change the amount of advice fee to be deducted from your TelstraSuper account for your ongoing advice service (Section B), and/or
- Change the TelstraSuper account from which the advice fee for your ongoing advice service is currently being deducted (Section C), and/or
- Withdraw your consent regarding the payment of the advice fee from your TelstraSuper account for your ongoing advice service (Section D)

The relevant changes will take effect from the date Telstra Super Financial Planning Pty Ltd (TSFP) (we, us) receives and processes your completed and signed form.

If you have any questions please contact your Financial Planner.

Important information

- TSFP is required by law to obtain your written consent before deducting any ongoing advice fees from your TelstraSuper account. Where a variation to the advice fee is made or a change of account for the deduction of advice fees, we require you to renew your written consent to deduct ongoing advice fees from your TelstraSuper account.
- Where you are varying your consent, this variation of consent form varies the consent you signed on [redacted], in relation to your ongoing advice service agreement with anniversary date* [redacted], and an expiry date set out in the "Expiry of Consent" section below.
- If you are not happy with the amount described, or the amount of the fee described does not reflect the ongoing advice fee agreed with your Financial Planner, you are not obliged to sign the consent form. Please contact your Financial Planner to discuss this further.
- We will contact you annually to obtain your continued consent to deduct the ongoing advice fees.
- Where you are withdrawing your consent for the deduction of the advice fee from your TelstraSuper account relating to your ongoing advice service, and wish to remain on the Ongoing Service Agreement, you will need to complete a direct debit form so that the fees can be deducted from your bank account. Your Financial Planner will provide this form to you.
- The advice fee is pro-rated and is deducted from your super account quarterly in arrears. Any residual advice fee not yet paid, relating to services provided in the period prior to the effective date of cancellation, will be deducted from your TelstraSuper account. No advice fee will be charged in respect of any period after the cancellation takes effect.

Expiry of Consent

Your consent expires on [redacted], which is 150 days after the anniversary day of the ongoing fee arrangement. After this date TSFP is required to obtain your consent again in order to continue deducting ongoing fees from your account in return for ongoing services for the next 12 months.

A

Your information

Title	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Miss	<input type="checkbox"/> Ms	<input type="checkbox"/> Other	<input type="text"/>
Surname	<input type="text"/>			Member number	<input type="text"/>	
Given name(s)	<input type="text"/>			Date of birth	<input type="text"/>	
Residential address (PO Box not acceptable)	<input type="text"/>					
Suburb	<input type="text"/>			State	<input type="text"/>	Postcode <input type="text"/>
Mobile	<input type="text"/>	Home phone no.	<input type="text"/>	Business phone no.	<input type="text"/>	
Email address	<input type="text"/>					

* Anniversary day is the anniversary of the day on which the ongoing advice service agreement commences.

B**Variation of the amount of the advice fee deducted from your TelstraSuper account**

Complete this section only if the deduction amount has changed.

The total advice fee payable under the ongoing advice service agreement and renewable annually is:

\$ per year (plus GST where applicable)

The advice fee payable by you, as determined by your Financial Planner (where applicable)

\$ per year (plus GST where applicable)

The advice fee amount to be deducted from your previously nominated TelstraSuper account (or detailed below in Section C)

\$ per year

\$ per quarter (approximately)*

*We have used the full quarter's payment as an estimate (rather than a pro-rated amount). Only that portion of the advice that relates to superannuation, can be payable from your TelstraSuper account.

C**Variation of the TelstraSuper account nomination**

Complete this section only if the TelstraSuper Account details have changed.

Please nominate the account from which the advice fee is to be deducted

e.g., *TelstraSuper Corporate Plus*, *TelstraSuper Personal Plus*, *TelstraSuper RetireAccess* and specify the account number:

Account

Account no.

D**Withdrawal of consent to deduct fees from my nominated TelstraSuper account**☐

By ticking this box, I confirm I wish to withdraw my consent for the payment of fees to be deducted from my TelstraSuper Account. I confirm I wish to remain on the Ongoing Advice Service Agreement and I understand that fees will be deducted from my bank account.

E**Your declaration & signature:**

I declare that:

- I have read and understood the Important Information section of this form
- All details provided on this form are true and correct
- If applicable, I understand that by signing this form, I consent to the changes outlined in either Section B, Section C or both, as applicable
- Unless I am withdrawing my consent in this form, I understand that my consent for fees to be deducted from my TelstraSuper account will expire (as outlined in the Important Information Section) and if I wish to continue with the ongoing advice services, I will need to provide TSFP with my written consent again for fees to be deducted
- Where applicable, I agree to pay the advice fee specified for the ongoing advice service to be provided to me (and my spouse, where applicable) by TSFP
- Where applicable, I understand that the advice fee amount specified is based on the advice fee applicable at the date this form is signed by me
- I understand that, in accordance with the ongoing advice service agreement, TSFP may adjust the advice fee for the ongoing advice service at any time.
- I authorise and provide my written consent to TSPL the trustee of TelstraSuper to deduct the advice fee amount from my TelstraSuper account and pay the advice fee amount to TSFP on my behalf
- I understand that the balance of my TelstraSuper account will be reduced by the advice fee amount.

Name

Signature

X

Date

OFFICE USE ONLY☐ LOT ☐ SOT

Percentage of the advice fee payable by the client

☐ 25% ☐ 50% ☐ 75% ☐ 100%

Percentage of the advice fee payable to be deducted from the client's TelstraSuper account

☐ 25% ☐ 50% ☐ 75% ☐ 100%Change of deduction ☐ Change of account ☐ Withdrawal of consent ☐Date written confirmation sent to the client acknowledging the request to vary/withdraw their consent Date TelstraSuper has been advised of a change to the fee deduction amount/account number or withdrawal of consent **Financial Planner declaration & signature**

I declare that I have:

- provided the client with all of the required information regarding the advice fee for the ongoing advice service, and
- determined the appropriate amount that can be deducted from the client's TelstraSuper account in accordance with legislative requirements, and
- I have confirmed in writing to the client (within the 10 business day requirement) that we have received their notice to vary or withdraw their consent, and
- I have provided notice to TelstraSuper (within the 10 business day requirement) of receipt of the client's variation to or a withdrawal of their consent.

Financial Planner name

Financial Planner signature

Phone

Email

Please return the completed form to:
Telstra Super Financial Planning Pty Ltd, PO Box 14309, Melbourne, VIC 8001 or email advice@telstrasuper.com.au

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