

# Optional Advice Fee Authorisation

Superannuation and Retirement Service



**FREEDOM  
OF CHOICE**

This form is used when you want to authorise a fee to be deducted from your Freedom of Choice account and paid to your financial adviser as a one off lump sum amount. This is not a recurring fee and is only payable where the advice incorporates your Freedom of Choice account.

## Section 1: PERSONAL DETAILS

Surname:	<input type="text"/>	Salutation:	<input type="text"/>
Given Name(s):	<input type="text"/>	Date of Birth:	<input type="text"/>
Postal Address:	<input type="text"/>		
Suburb:	<input type="text"/>	State:	<input type="text"/>
		Postcode:	<input type="text"/>
Telephone (BH):	<input type="text"/>	(AH):	<input type="text"/>
		Mobile:	<input type="text"/>
Email:	<input type="text"/>	Membership Number:	<input type="text"/>

## Section 2: OPTIONAL ADVICE FEE

Amount to be paid (inclusive of full GST): \$

## Section 3: ADVISER DETAILS

Adviser's Full Name:	<input type="text"/>		
Business Name:	<input type="text"/>		
Authorised Representative Number:	<input type="text"/>		
Telephone:	<input type="text"/>	Mobile:	<input type="text"/>
Email:	<input type="text"/>		

## Section 4: MEMBER'S AUTHORISATION

I, the Freedom of Choice member whose details are provided in Section 1 above, and whose signature appears below, authorise the Trustee of Freedom of Choice to deduct the amount specified in Section 2 from my account in Freedom of Choice, and to pay the full amount to the Adviser specified in Section 3.

Signature:	<input type="text"/>	Date:	<input type="text"/>
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## Section 5: ADVISER'S DECLARATION

I, the Adviser whose details are provided in Section 3 of this form, and whose signature appears below, confirm that the nominated Optional Advice Fee is in relation to services to be provided to the Member specified in Section 1, and that these services incorporate advice in relation to their Freedom of Choice account.

Signature:	<input type="text"/>	Date:	<input type="text"/>
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**FoC, a division of AMG Super**

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Issued by the trustee:  
**Equity Trustees Superannuation Limited**

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