

Related Accounts Application Form



FREEDOM
OF CHOICE

You can link your Related Accounts and reduce the amount you pay in administration fees across the different products offered, i.e. Personal Superannuation Service, Personal Retirement Service and Portfolio Service. A maximum of six accounts may be linked.

Related Accounts

Accounts that qualify as being a Related Account include:

- your own;
- your immediate family (spouse, partner, parents, children); and
- companies, trusts and self managed superannuation funds where all shareholders or all beneficiaries qualify as being related.

Related Accounts Pricing

The account balance is aggregated for the first and subsequent Related Accounts up to a maximum of six accounts. The tiered administration fee is then applied across the aggregated account balance and applied proportionately to each account on a monthly basis as per the Product Disclosure Statement ('PDS'). Please complete this form to be eligible.

Below is an example of how the Related Account Pricing might work in practice, showing you a saving of \$905 across the Related Accounts.

Relationship	Product	Account balance	Normal fees p.a.	Related account pricing fees p.a.
You	Super	\$350,000	\$2,685	\$2,000
Partner	Super	\$350,000	\$2,685	\$2,000
Aggregated totals		\$700,000	\$5,370	\$4,000

Section 1: MEMBER DETAILS

Account name:	<input type="text"/>	(Primary Account Holder)
Account number:	<input type="text"/>	Date of birth: <input type="text"/>
Account name:	<input type="text"/>	Date of birth: <input type="text"/>
Account number:	<input type="text"/>	Relationship: <input type="text"/>
Account name:	<input type="text"/>	Date of birth: <input type="text"/>
Account number:	<input type="text"/>	Relationship: <input type="text"/>
Account name:	<input type="text"/>	Date of birth: <input type="text"/>
Account number:	<input type="text"/>	Relationship: <input type="text"/>
Account name:	<input type="text"/>	Date of birth: <input type="text"/>
Account number:	<input type="text"/>	Relationship: <input type="text"/>

Section 2: ADVISER ACKNOWLEDGEMENT

I acknowledge that the above investors meet the relationship and/or related entities criteria.

Signature:	<input type="text"/>	Date:	<input type="text"/>
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