



February 2018

Super Choice – Fund Nomination

If you would like IOOF Portfolio Service Superannuation Fund to become your chosen fund, please provide the completed form and Certificate of compliance to your employer. Do NOT send this form to IOOF Portfolio Service Superannuation Fund. You must keep a copy of your own records for a period of five years.

Please complete these instructions in BLACK INK using CAPITAL LETTERS and ✓ boxes where provided.

Step 1: Employee/Member details

Form fields for Title, Surname, Given name(s), and Employee number.

Step 2: Fund details

Please tick the product applicable to you:

- IOOF Pursuit Select Personal Superannuation (Unique Superannuation Identifier (USI) IOF0083AU)
IOOF Pursuit Core Personal Superannuation (Unique Superannuation Identifier (USI) IOF0086AU)
IOOF Pursuit Focus Personal Superannuation (Unique Superannuation Identifier (USI) IOF0186AU)
IOOF Portfolio Service Personal Superannuation (Unique Superannuation Identifier (USI) IOF0057AU)

Fund ABN 70 815 369 818
Telephone 1800 062 963
Fund address GPO Box 264, Melbourne VIC 3001
Email clientservices@ioof.com.au

Account number form with dashes

The attached Certificate of compliance confirms that the IOOF Portfolio Service Superannuation Fund is a complying fund that meets the requirements of the Superannuation Industry Supervision Act 1993 (SIS Act) as may be amended or replaced from time to time.

Step 3: Member signature

For the purpose of s.32F of the Superannuation Guarantee (Administration) Act 1992, I request that all future Superannuation Guarantee contributions made on my behalf by my employer, be made to my chosen fund as set out in Step 2.

Signature and Date fields

Employer payment methods

Employers must ensure that all contributions are made to the fund in accordance with SuperStream requirements – meaning both payments and associated data are sent in a standard electronic format prescribed by the Australian Taxation Office (ATO).

Your employer can use a contribution clearing house, a payroll system that meets the SuperStream standard, or the ATO Small Business Superannuation Clearing House (if you work for a small business).

Please contact our Client Services Team on 1800 062 963 for further details.



Creating financial independence since 1846

Please note: This letter can be provided to the fund you are transferring from to confirm that IOOF Portfolio Service Superannuation Fund is a complying superannuation fund.

To whom it may concern

Certificate of compliance

IOOF Portfolio Service Superannuation Fund (SFN 3002/079/41), ABN 70 815 369 818, incorporating:

- Pursuit Select Personal Superannuation (USI IOF0083AU)
- Pursuit Core Personal Superannuation (USI IOF0086AU)
- Pursuit Focus Personal Superannuation (USI IOF0186AU)
- IOOF Portfolio Service Personal Superannuation (USI IOF0057AU)

We certify that:

- 1 IOOF Portfolio Service Superannuation Fund (Fund) is a complying superannuation fund within the meaning of the *Superannuation Industry (Supervision) Act 1993* (the Act)
- 2 the Trustee is IOOF Investment Management Limited (IIML) ABN 53 006 695 021, AFS Licence No. 230524
- 3 the Trustee of the Fund has not been directed by the Australian Prudential Regulation Authority to cease accepting contributions under Section 63 of the Act
- 4 the Trust Deed allows benefits to be transferred/rolled over to the Fund.

Frank Lombardo
Group General Manager Client & Process
On behalf of IOOF Investment Management Limited

Trustee

IOOF Investment Management Limited
ABN 53 006 695 021
AFS Licence No. 230524

Registered Address

Level 6, 161 Collins Street, Melbourne, VIC 3000

Client Services

Postal Address Reply Paid 264, Melbourne, VIC 8060
Telephone 1800 062 963
Facsimile 1800 558 539
Email clientservices@ioof.com.au