



October 2014

## Super Choice – Fund Nomination

Financial Partnership Portfolio Service Personal Superannuation | Financial Partnership Portfolio Service Employer Superannuation

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.

Please complete these instructions in BLACK INK using CAPITAL LETTERS (except for your email address) and ✓ boxes where provided.

### Step 1: Employee/Member details

Title (Dr/Mr/Mrs/Ms/Miss)    Surname   
Given name(s)   
Street address   
Suburb  State  Postcode   
Employer number   
Date of birth  /  /  Gender Male  Female   
Tax File Number  -  -

### Step 2: Fund details

Financial Partnership Portfolio Service Personal Superannuation (Unique Superannuation Identifier (USI) IOF0069AU)  
 Financial Partnership Portfolio Service Employer Superannuation (Unique Superannuation Identifier (USI) IOF0067AU)

**Fund ABN** 70 815 369 818  
**Telephone** 1800 000 137  
**Fund address** GPO Box 264, Melbourne VIC 3001  
**Email** clientservices@ioof.com.au

Account number  -  -

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  Date  /  /

## Step 4: Employer method of payment

There are a number of ways your employer can make contributions to your chosen fund:

### SuperStream

- Via your employer's clearing house or payroll facility
- Please refer your employer to the appropriate USI

For more information, please refer to the Contribution guide and fund details flyer on the IOOF website.

### Payment by cheque

The cheque should be made payable to 'IOOF – member's full name and/or account number'. With the cheque please attach:

- The member's name and account number;
- How much of the cheque comprises Superannuation Guarantee (SG) contributions, other employer contributions (eg salary sacrifice) and/or personal contributions. Without detailed information we will assume that all employer contributions are SG contributions.

### Payment by BPAY®

Your employer can make the contributions to the Fund by BPAY. This facility is only available if your nominated financial institution offers this service. Each type of contribution has a separate Biller Code for identification purposes.

#### The Biller Codes are:

Contribution type	Biller Code
Superannuation Guarantee	172304
Spouse Contributions	172338
Salary Sacrifice	212944
Personal Contributions	172320
Other Employer Contributions	172296

Customer reference number (CRN) for BPAY purposes

(available on your Statement of Membership)

• Registered to BPAY Pty Ltd ABN 69 079 137 518



Creating financial independence since 1846

To whom it may concern

# Certificate of compliance

IOOF Portfolio Service Superannuation Fund (ABN 70 815 369 818), incorporating:

- Financial Partnership Portfolio Service Personal Superannuation (USI) IOF0069AU
- Financial Partnership Portfolio Service Employer Superannuation (USI) IOF0067AU

We certify that:

- 1 IOOF Portfolio Service Superannuation Fund (the Fund) is a complying superannuation fund within the meaning of the Superannuation Industry Supervision Act 1993 (SIS Act);
- 2 the Trustee is IOOF Investment Management Limited (IOOF), ABN 53 006 695 021;
- 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 SIS Act
- 4 the Trust Deed allows
  - employer Superannuation Guarantee contributions to be made to the Fund
  - benefits to be rolled over or transferred to the Fund.

Julie Orr  
General Manager Operations  
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  
**Phone** 1800 000 137  
**Fax** 1800 558 539  
**Email** clientservices@ioof.com.au