



19 July 2021

## Additional Lump Sum Contribution

- IOOF Employer Super
- IOOF Personal Super

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

### Step 1: Member details

Account number

Title (Dr/Mr/Mrs/Ms/Miss)  Surname

Given name(s)

Phone (home)       Phone (work)

Mobile       \* Tax file number (TFN)

Email

Date of birth  /  /

\* Please provide your TFN if you have not previously provided your TFN to us.

Please provide your tax file number (TFN) when acquiring this product. Under the *Superannuation Industry (Supervision) Act 1993*, we are authorised to collect your TFN, which will only be used for lawful purposes and in accordance with the *Privacy Act 1988*. It is not an offence if you choose not to provide your TFN, but providing it has its advantages, including:

- we will be able to accept all permitted contributions
- other than the tax that may ordinarily apply, you will not pay more tax than you need to, and
- it will be easier to find different super accounts in your name.

### Step 2: Contribution eligibility requirement

I am under age 67.

**OR**

I am over 67 and under 75 years of age. I have worked at least 40 hours over 30 consecutive days during this financial year.

**OR**

I am over age 67 and under age 75 years and I am contributing this financial year under the one-off exemption from the (above) work test.

**OR**

I am over 65 and making a downsizer contribution. You must provide us with a completed ATO downsizer contribution form before or at the time of making your downsizer contribution. This form is available from the ATO website.

### Step 3: Contribution payment information

**Important:** For any initial deposit equal to or more than \$2 million you must also complete a High Threshold Transaction Form separate to this application form. The High Threshold Transaction Form can be accessed on our website [www.ioof.com.au](http://www.ioof.com.au)

Personal contribution <sup>1</sup>	\$	<input type="text"/>
Spouse contribution	\$	<input type="text"/>
Downsizer contribution <sup>2</sup>	\$	<input type="text"/>
Personal Injury Payment <sup>3</sup>	\$	<input type="text"/>
CGT small business contribution <sup>3</sup>	\$	<input type="text"/>
<b>Total</b>	\$	<input type="text"/>

IOOF offers you the convenience of B<sub>PAY</sub><sup>®</sup>. To take advantage of this facility, contact ClientFirst for details. If paying by cheque, please make payable to **'Product name' – [your full name or account number]** and return to **IOOF, GPO Box 264, Melbourne VIC 3001**

<sup>o</sup> Registered to B<sub>PAY</sub> Pty Ltd ABN 69 079 137 518.

**Note:** If you wish to vary a Member Advice Fee - Upfront on your account please complete the Advice Fee form, which is available from [www.ioof.com.au](http://www.ioof.com.au).

### Step 4: Investment options

**MySuper members are not able to provide investment instructions within this form.**

Please DO NOT complete this section if this contribution is being invested in accordance with your existing investment strategy. You may nominate a unique investment option for this contribution by placing the required percentage of each investment in the space below and must include at least the default minimum allocation of 1% against the Cash Account. The option selected is for this contribution only. Your existing investment strategy WILL NOT be changed.

Prior to making your selection, the Trustee strongly recommends that you consider obtaining professional advice from a licensed financial adviser. Before making any decisions regarding an investment option, please read the relevant Product Disclosure Statement (PDS), which is available from [ioof.com.au](http://ioof.com.au), by contacting ClientFirst or from your licensed financial adviser. Our website provides a detailed list of available investments and underlying investment manager fees.

Investment code <sup>4</sup>	Investment fund name	Allocation (%)
<input type="text"/>	Cash Account (Mandatory)	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Total (must = 100%)</b>		<input type="text"/>

- 1 If you want to claim a tax deduction for your personal contribution, please complete a tax deduction notice which can be obtained from our website or contact Client first.
- 2 You must provide us with a completed ATO downsizer form before or at the time of making your downsizer contribution. The form is available from our website or by contacting ClientFirst.
- 3 Please complete the appropriate election form which can be obtained from our website or by contacting ClientFirst.
- 4 Refer to the Investment Options Menu for available investment codes. This is available from your licensed financial adviser, our website or by contacting ClientFirst.

## Step 5: Adviser declaration

I declare that I have given the member the fund PDS and the PDS for the underlying investment managers selected.

Adviser name

Licensee name

Adviser signature

Date  /  /

## Step 6: Member declaration

**Important note:** The Trustee collects the information in this form in order to process your investment instructions. Any personal information provided in this form will be handled in accordance with the Trustee’s privacy policy, available at [ioof.com.au/privacy](http://ioof.com.au/privacy). If you do not provide all of the requested information, we may not be able to action your request.

- I consent that where I have chosen an investment with a long withdrawal period (illiquid investments) or there are delays receiving proceeds from selling my investments, any withdrawal or transfer request may be delayed for more than 30 days.
- I confirm I have received and considered the relevant PDS for each of the investment options selected.
- I consent to the collection and use of the above information by the Trustee for the purposes specified in the PDS.
- The amount of any member advice fee(s) that are paid to my financial adviser, as agreed by me, will be an additional cost to me and charged against my super account. A member advice fee will not be charged unless I tell the Trustee to do so.
- Any agreed member advice fee(s) will be charged to my account and paid in full to my financial adviser.

Member signature

Date  /  /

**Please forward all correspondence and enquiries to**

**Post:** Reply Paid 264, Melbourne VIC 3001  
**Email:** [clientfirst@ioof.com.au](mailto:clientfirst@ioof.com.au)  
**Telephone:** 1800 913 118  
**Fax:** 03 6215 5800  
**Web:** [www.ioof.com.au](http://www.ioof.com.au)