



12 October 2023

# Family Fee Aggregation Application

Complete the following form to apply for Family Fee Aggregation across **IOOF Pension and Personal Super**.

### Terms and conditions

- Each person applying to link for the purposes of Family Fee Aggregation must be a member of the same immediate family (such as spouse, son, daughter, de facto, partner, father, mother, brother or sister and spouses of immediate family members) including multiple accounts for the same person.
- Any new Family Fee Aggregation nomination will override any previous nomination.
- A maximum of eight accounts are allowed to be linked together for Family Fee Aggregation purposes.
- Accounts nominated for Family Fee Aggregation within the same group must be associated with the same financial adviser.
- A Family Fee Aggregation request can be rejected and a linking can be cancelled at any time by us.
- Family Fee Aggregation does not apply to MySuper members.
- Each linked member will be able to view information about the other Family Fee Aggregation members online, including names, account numbers, commencement dates and annual administration fee discounts for the year.

The Trustee collects the information in this form for the purpose of updating the information it holds about me. Any personal information provided in this form will be handled in accordance with the Trustee's privacy policy, available at [www.ioof.com.au/privacy](http://www.ioof.com.au/privacy).

**Important:** Before you sign this document it is important that you read the current PDS and/or Offer Documents (available at [ioof.com.au](http://ioof.com.au)) and important information set out above in this Family Fee Aggregation Application.

By signing and submitting this application, you confirm that you are applying for your account(s) to be linked to other parties detailed on this form for the purpose of calculating the Administration Fee, and that the information you.

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

### Linked member

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

Given name(s)

Account number (if known)

Date of birth  /  /

Relationship to group (such as spouse)

**Important:** Before you sign this document it is important that you read the current PDS and/or Offer Documents (available at [ioof.com.au](http://ioof.com.au)) and important information set out above in this Family Fee Aggregation Application.

By signing and submitting this application, you confirm that you are applying for your account(s) to be linked to other parties detailed on this form for the purpose of calculating the Administration Fee, and that the information you.

Signature

Date  /  /

### Linked member

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

Given name(s)

Account number (if known)

Date of birth  /  /

Relationship to group (such as spouse)

**Important:** Before you sign this document it is important that you read the current PDS and/or Offer Documents (available at [ioof.com.au](http://ioof.com.au)) and important information set out above in this Family Fee Aggregation Application.

By signing and submitting this application, you confirm that you are applying for your account(s) to be linked to other parties detailed on this form for the purpose of calculating the Administration Fee, and that the information you.

Signature  Date  /  /

### Linked member

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

Given name(s)

Account number (if known)

Date of birth  /  /

Relationship to group (such as spouse)

**Important:** Before you sign this document it is important that you read the current PDS and/or Offer Documents (available at [ioof.com.au](http://ioof.com.au)) and important information set out above in this Family Fee Aggregation Application.

By signing and submitting this application, you confirm that you are applying for your account(s) to be linked to other parties detailed on this form for the purpose of calculating the Administration Fee, and that the information you.

Signature  Date  /  /

### Linked member

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

Given name(s)

Account number (if known)

Date of birth  /  /

Relationship to group (such as spouse)

**Important:** Before you sign this document it is important that you read the current PDS and/or Offer Documents (available at [ioof.com.au](http://ioof.com.au)) and important information set out above in this Family Fee Aggregation Application.

By signing and submitting this application, you confirm that you are applying for your account(s) to be linked to other parties detailed on this form for the purpose of calculating the Administration Fee, and that the information you.

Signature  Date  /  /

### Linked member

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

Given name(s)

Account number (if known)

Date of birth  /  /

Relationship to group (such as spouse)

**Important:** Before you sign this document it is important that you read the current PDS and/or Offer Documents (available at [ioof.com.au](http://ioof.com.au)) and important information set out above in this Family Fee Aggregation Application.

By signing and submitting this application, you confirm that you are applying for your account(s) to be linked to other parties detailed on this form for the purpose of calculating the Administration Fee, and that the information you.

Signature  Date  /  /

### Linked member

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

Given name(s)

Account number (if known)

Date of birth  /  /

Relationship to group (such as spouse)

**Important:** Before you sign this document it is important that you read the current PDS and/or Offer Documents (available at [ioof.com.au](http://ioof.com.au)) and important information set out above in this Family Fee Aggregation Application.

By signing and submitting this application, you confirm that you are applying for your account(s) to be linked to other parties detailed on this form for the purpose of calculating the Administration Fee, and that the information you.

Signature  Date  /  /

### Linked member

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

Given name(s)

Account number (if known)

Date of birth  /  /

Relationship to group (such as spouse)

**Important:** Before you sign this document it is important that you read the current PDS and/or Offer Documents (available at [ioof.com.au](http://ioof.com.au)) and important information set out above in this Family Fee Aggregation Application.

By signing and submitting this application, you confirm that you are applying for your account(s) to be linked to other parties detailed on this form for the purpose of calculating the Administration Fee, and that the information you.

Signature  Date  /  /

## Linked member

Title (Dr/Mr/Mrs/Ms/Miss)	<input type="text"/>	Surname	<input type="text"/>
Given name(s)	<input type="text"/>		
Account number (if known)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of birth	<input type="text"/>	/	<input type="text"/>
Relationship to group (such as spouse)	<input type="text"/>		

**Important:** Before you sign this document it is important that you read the current PDS and/or Offer Documents (available at [ioof.com.au](http://ioof.com.au)) and important information set out above in this Family Fee Aggregation Application.

By signing and submitting this application, you confirm that you are applying for your account(s) to be linked to other parties detailed on this form for the purpose of calculating the Administration Fee, and that the information you.

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

**Please forward all correspondence and enquiries to**

### Applications and forms

**Post** IOOF Personal Super, Reply Paid 264, Melbourne VIC 8060

**Email** [clientfirst@ioof.com.au](mailto:clientfirst@ioof.com.au)

**Fax** 03 6215 5800

### Enquiries

**Telephone enquiries** 1800 913 118

**Email enquiries** [clientfirst@ioof.com.au](mailto:clientfirst@ioof.com.au)