



**IOOF**

# ESSENTIAL SUPER

19 July 2021

## Additional Lump Sum Contribution

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

### Step 1: Member details

Account number

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

Given name(s)

Date of birth  /  /

### 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 67 and under 75 years of age. I have worked at least 40 hours over 30 consecutive days during the previous financial year, my total super balance was less than \$300,000 as at the previous 30 June and I have not previously used the work test exemption.

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

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**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

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 [www.ioof.com.au](http://www.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 [www.ioof.com.au/privacy](http://www.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 fees(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:** IOOF Essential  
GPO Box 264, Melbourne VIC 3001

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

**Telephone:** 1800 913 118

**Web:** [www.ioof.com.au](http://www.ioof.com.au)