



1 December 2021

## Fees and costs amendment

- IOOF Employer Super
- IOOF Personal Super
- IOOF Pension

### For existing clients

**Before completing this form, it is recommended that you seek advice from a financial adviser to assist you in deciding whether to change the fees and costs applicable to your IOOF account.**

Please complete this form if you would like to change the fees and costs currently charged on your existing IOOF account to those described in the current IOOF Employer Super, IOOF Personal Super and/or IOOF Pension Product Disclosure Statements (PDS).

A copy of the current PDS is available to download at [www.ioof.com.au](http://www.ioof.com.au)

If you are unsure of the fees and costs currently charged on your account, please contact us or your financial adviser.

**Please complete these instructions in BLACK INK using CAPITAL LETTERS.**

### Step 1: Member details

Account number

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

Surname

Given name(s)

Date of birth

### Step 2: Authorisation

I declare that:

- I have read and understood the current PDS for the product relevant to my existing IOOF account.
- I authorise the Trustee to apply the fees and costs disclosed in the current relevant PDS to my existing IOOF account.
- I acknowledge and accept that I make this decision based on advice received from my financial adviser, or alternatively on my own accord having chosen not to seek financial advice.
- I am aware that the new fees and costs may be lower or higher than those already payable on my existing IOOF account.
- I am aware of the differences that will apply once this instruction to change the fees and costs is processed.
- I acknowledge and accept that once this instruction is processed and the change is made to my IOOF account, I cannot revert to the original pricing.
- I understand that 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).

Member signature

Date

Please sign and return this form to:

**Post** Reply Paid 264, Melbourne, VIC 8060

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

**Facsimile** 03 6215 5933

**Telephone** 1800 913 118