



Please complete in BLOCK letters
For an authorised officer to complete and sign

Plan details

Office use only

Plan name	Plan reference	Member reference

		/ /
Member name (Simple Super only)	Nominated retirement age (Simple Super only)	Schedule effective date

Insurance benefit groups

Please complete this section to define each of the insurance benefit groups you wish to establish for members of this plan. When new members join the plan you must nominate an insurance group on their **Application for membership**, or **EASY start member enrolment advice**.

Notes for insurance groups

- For insured members to be eligible for automatic acceptance to the plan, each insurance group must be **clearly defined** in terms of occupation, management status or other objective criteria. All insurance groups must have a minimum of 10 insured lives for Automatic Acceptance. Eligibility for membership and other schedule conditions must also be consistent for each insurance group
- For benefit basis A, B, C, D, E and F, Total and Permanent Disablement and Total but Temporary Disablement cover reduces progressively to zero over the 10 years prior to a member reaching age 65
- Only benefit options 2 or 3 are available if benefit basis K is selected
- Casual employees and part-time employees working less than 15 hours per week are restricted to Death Only cover under benefit basis K (\$1 or \$2 per week)
- Part-time employees working more than 15 hours per week can have Death and Total and Permanent Disablement cover under benefit basis K (\$1 or \$2 per week) or salary linked formulae (benefit basis E, F or G)

Insurance group number	Insurance group description

Benefit options (please tick)

<input type="checkbox"/> 1 Death, Total and Permanent Disablement and Total but Temporary Disablement	Insurance only <input type="checkbox"/> Yes <input type="checkbox"/> No	*Eligibility to join <input type="checkbox"/> At employer invitation <input type="checkbox"/> Condition of employment
<input type="checkbox"/> 2 Death and Total and Permanent Disablement	*Minimum age <input type="text" value=""/> years	*Minimum service <input type="text" value=""/> months
<input type="checkbox"/> 3 Death only	Work status (please tick ONE)	
<input type="checkbox"/> 4 No insurance	<input type="checkbox"/> Full-time <input type="checkbox"/> Permanent part-time <input type="checkbox"/> Casual	
	Hours worked per week	
	<input type="checkbox"/> Less than 15 <input type="checkbox"/> 15 or more	

Benefit basis (please tick and enter the value of the initial benefit)

Note that benefit bases C, D and F are no longer available to new members or existing members as a choice of insurance cover. However, if the plan has a default insurance group with either C, D or F as the benefit basis, the member may be enrolled into the group at commencement in the plan.

Initial benefit

<input type="checkbox"/> A Nominated amount	\$ <input type="text" value=""/> (nominated amount)
<input type="checkbox"/> B Nominated amount linked to CPI	\$ <input type="text" value=""/> (nominated amount)
<input type="checkbox"/> C Nominated amount less retirement accumulation	\$ <input type="text" value=""/> (nominated amount)
<input type="checkbox"/> D Nominated amount linked to CPI less retirement accumulation	\$ <input type="text" value=""/> (nominated amount)
<input type="checkbox"/> E Multiple of salary	<input type="text" value=""/> (value of multiple)
<input type="checkbox"/> F Multiple of salary less retirement accumulation	<input type="text" value=""/> (value of multiple)
<input type="checkbox"/> G x % of salary multiplied by term to selected retirement age (subject to a maximum of y multiplied by salary)	<input type="text" value=""/> value of X <input type="text" value=""/> value of Y
<input type="checkbox"/> K Fixed table of cover costing \$1 or \$2 per week (\$0.75 or \$1.50 for Death only cover)	<input type="checkbox"/> \$1 <input type="checkbox"/> \$2 <input type="checkbox"/> \$0.75 <input type="checkbox"/> \$1.50 (please tick)

* This applies to Tailored Super only.

If you wish to define additional insurance benefit groups for your members, please complete this section. If you decide not to define your own insurance groups, only the EASY insurance groups will be applied to your plan*.

Insurance group number	Insurance group description

Benefit options (please tick)

<input type="checkbox"/> 1 Death, Total and Permanent Disablement and Total but Temporary Disablement <input type="checkbox"/> 2 Death and Total and Permanent Disablement <input type="checkbox"/> 3 Death only <input type="checkbox"/> 4 No insurance	Insurance only <input type="checkbox"/> Yes <input type="checkbox"/> No *Eligibility to join <input type="checkbox"/> At employer invitation <input type="checkbox"/> Condition of employment *Minimum age <input type="text" value=""/> years *Minimum service <input type="text" value=""/> months Work status (please tick ONE) <input type="checkbox"/> Full-time <input type="checkbox"/> Permanent part-time <input type="checkbox"/> Casual Hours worked per week <input type="checkbox"/> Less than 15 <input type="checkbox"/> 15 or more
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Benefit basis (please tick and enter the value of the initial benefit)

Note that benefit bases C, D and F are no longer available to new members or existing members as a choice of insurance cover. However, if the plan has a default insurance group with either C, D or F as the benefit basis, the member may be enrolled into the group at commencement in the plan.

	Initial benefit
<input type="checkbox"/> A Nominated amount	\$ <input type="text" value=""/> (nominated amount)
<input type="checkbox"/> B Nominated amount linked to CPI	\$ <input type="text" value=""/> (nominated amount)
<input type="checkbox"/> C Nominated amount less retirement accumulation	\$ <input type="text" value=""/> (nominated amount)
<input type="checkbox"/> D Nominated amount linked to CPI less retirement accumulation	\$ <input type="text" value=""/> (nominated amount)
<input type="checkbox"/> E Multiple of salary	<input type="text" value=""/> (value of multiple)
<input type="checkbox"/> F Multiple of salary less retirement accumulation	<input type="text" value=""/> (value of multiple)
<input type="checkbox"/> G x % of salary multiplied by term to selected retirement age (subject to a maximum of y multiplied by salary)	<input type="text" value=""/> value of X <input type="text" value=""/> value of Y
<input type="checkbox"/> K Fixed table of cover costing \$1 or \$2 per week (\$0.75 or \$1.50 for Death only cover)	<input type="checkbox"/> \$1 <input type="checkbox"/> \$2 <input type="checkbox"/> \$0.75 <input type="checkbox"/> \$1.50 (please tick)

Health evidence requirements

- If a member is enrolled with Easy insurance within 120 days of joining the company, no health evidence will be required.
- If an **Application for membership** or **Enrolment advice** are not received within 120 days of joining the company, health evidence will be required.
- If insurance benefit basis K is chosen at the cost of \$2 per week, the member must complete a **Health Questionnaire** if automatic acceptance does not apply.
- If a nominated amount or multiple of salary benefit basis (A, B, C, D, E, F, or G) is selected and automatic acceptance does not apply, the member must complete a **Personal Statement**.
- These forms are available from your financial adviser, the Product Disclosure Statement or our Customer Service Centre..

Employer declaration

I certify that all of the above information is true and correct

X	/ /
Signature of Authorised Officer	Date

* This applies to Tailored Super only.

Please keep a copy of the completed form for your records. You will need the information to complete application forms for new members.