



# Change to member preferences

For changes/alterations to your membership, please complete this form. Please ensure you have read the AXA's Business Super Rollover Section Product Disclosure Statement (PDS), issued 31 March 2011 and the Supplementary Product Disclosure Statement (SPDS) dated 1 October 2011. This form is effective from 1 October 2011.

Please note that AXA will not be able to process your request unless mandatory sections 1 and 5 are completed.

If you want to make a new nomination, confirm a previous nomination of beneficiary or revoke an existing nomination please download a copy of the 'Death benefit beneficiary nomination form' at [axa.com.au](http://axa.com.au) or contact our Customer Service Centre on 133 056 to request a copy.

## 1 Member details (mandatory section)

/   
Member number

Mr  Mrs  Miss  Ms  Other please specify

Surname (please print)  Given name(s)  / / Date of birth

Street number and name  Town/Suburb  State  Postcode

( ) Home telephone  ( ) Work telephone  Mobile number

Email address

Occupation

## 2 Tax file number (TFN) notification

TFN

Your TFN is confidential. Before you provide your TFN we are required to tell you the following:

- TFNs are collected under the Superannuation Industry (Supervision) Act 1993, Retirement Savings Accounts Act 1997, the Privacy Act 1988 and taxation acts (including the income tax and superannuation surcharge tax acts).
- The Trustee and fund administrator will only use your TFN for super purposes, including:
  - Finding or joining together your super benefits
  - Calculating the correct tax on employment termination payments
  - Passing it to the Trustee of another super fund or provider of a retirement savings account when transferring your benefits. You may give us written instructions not to pass it on before any transfer
  - Passing it on to the Australian Taxation Office (ATO):
    - if we have paid you a benefit
    - to report contributions, or
    - if you have unclaimed super money after reaching the Aged Pension age.

These purposes may change in the future as a result of legislative changes.

### What happens if I do not quote my TFN

You are not obliged to provide your TFN to your super fund. However, if you do not provide your TFN your benefit may be taxed at the highest marginal tax rate plus the Medicare levy on contributions made into your account in the year, compared to the concessional tax rate of 15 per cent and your personal contributions will be refunded. Your fund may deduct additional tax from your account.

If your superannuation fund does not have your TFN, you will not be able to make personal contributions to your superannuation account.

If you are a non-resident and you do not provide a TFN, the Trustee must withhold the prescribed rate of tax when paying a lump-sum benefit. A tax exemption code is not recognised as a valid TFN.

Choosing to quote your TFN will also make it easier to keep track of your super in the future.

If you require further information please contact the ATO Superannuation Helpline on 131 020 or your financial adviser.

**Change to member preferences**

### 3 Changes to investment choice

The investment choices you make will affect the performance of your superannuation.

Before you decide on your investment portfolio(s), we recommend that you speak to your financial adviser.

If you do not make a choice, contributions received may be invested in accordance with your previous instructions, or if you have not given any instructions in the Multi-manager Balanced portfolio.

**Super Directions for Business Rollover Section members**

You can choose up to a maximum of six portfolios for your existing retirement accumulation (minimum of \$1,000 in any one portfolio) and for your future contributions.

**Simple Super Rollover Plan and Tailored Super Rollover Plan members**

You can choose up to a maximum of five portfolios for your existing accumulation (minimum of \$1,000 in any one portfolio).

	Please switch my current retirement accumulation				Investment portfolios for FUTURE contributions*
	FROM (COLUMN A)		TO (COLUMN B)		
<b>Diversified portfolios</b>					
Guaranteed Plus	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
Multi-manager Secure	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
Secure <sup>†</sup>	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
Multi-manager Secure Growth	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
Multi-manager Balanced	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
Managed <sup>†</sup>	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
Property Biased <sup>†</sup>	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
Multi-manager Growth	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
Multi-manager High Growth	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
<b>Sector/specialist portfolios</b>					
AXA Cash	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
AXA Diversified Fixed Interest	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
Property <sup>†</sup>	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
AXA Listed Property <sup>‡</sup>	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
Multi-manager Australian Equities <sup>‡</sup>	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
Australian Equities <sup>†</sup>	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
AXA's Wholesale Australian Equity – Value Fund <sup>‡</sup>	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
Colonial First State Wholesale Imputation Fund <sup>‡</sup>	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
Multi-manager International Equities <sup>‡</sup>	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
International Equities <sup>†</sup>	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
AXA's Wholesale Global Equity – Value Fund <sup>‡</sup>	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
AXA's Wholesale Global Equity – Growth Fund <sup>‡</sup>	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
<b>Closed portfolios</b>					
Security Plus <sup>†§</sup>	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
AXA's Wholesale Australian Equity – Industrials Fund <sup>‡§</sup>	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> % or <input type="text"/> \$	<input type="text"/> %	<input type="text"/> %
AXA's Wholesale Australian Monthly Income Fund <sup>‡¶</sup>	<input type="text"/> % or <input type="text"/> \$				

\* This column is not applicable for Simple Super Rollover Plan and Tailored Super Rollover Plan members.

† These portfolios are not available to members who transferred to the Super Directions for Business Rollover Section prior to 1 May 2011.

‡ These portfolios are not available to Simple Super Rollover Plan and Tailored Super Rollover Plan members.

§ These portfolios are closed to new investors. If you already have funds invested in these portfolios and choose to switch all of your funds out of the portfolio, you cannot at a later date elect to switch back in.

¶ AXA's Wholesale Australian Monthly Income Fund will not be accepting future contributions from 12 December 2011.

**Change to member preferences**

## 4 Changes to insurance benefits

This section defines your insurance benefits. We recommend that you speak to your financial adviser before you make any changes to your insurance. Upon completing this section, any insurance cover you currently have will be overridden with the choice you make below.

If you are a member of the Simple Super Rollover Plan or Tailored Super Rollover Plan or were transferred to the Super Directions for Business Rollover Section prior to 31 August 2009, by making an application for insurance your membership will be upgraded to the Super Directions for Business Rollover Section and the fees, charges and benefits at 1 October 2011 will apply. Please read the PDS for more information. A personal statement must accompany this form when applying for new cover or an increase to existing cover.

Please note: Total and Permanent Disablement (TPD) insurance cover, after you reach age 60, will reduce progressively by 20 per cent at each annual review to zero on your 65th birthday as described in the PDS.

Please provide me with the following insurance cover (benefit type): (please tick **ONE** option only)

1 No insurance (any insurance cover you currently have will be cancelled)

2 Death only ▶ \$

3 Death and Total and Permanent Disablement ▶ \$

Note: By selecting one of the above options, you will override any existing cover you have.

## 5 Member declaration (mandatory section)

### Privacy – use and disclosure of personal information

The privacy of your personal information is important to you and also to AXA. The purpose of collecting your information is to assess your application and manage your membership with the Fund.

If you are also applying for insurance cover, we will collect additional information about you and your immediate family background that is necessary for assessing your application for insurance, or any claim you may make, and for managing your cover. This includes information about health, financial situation, occupation and lifestyle. If the information you give us is not complete or accurate we may not be able to provide you with the products and services you have applied for.

In assessing your application, or any subsequent claim, and managing your super, AXA may disclose your personal information to government bodies as required by law (eg the ATO), to individuals as required by law (eg under family law superannuation splitting arrangements) and to other parties, such as providers of retirement and savings products, a financial adviser, your employer, a policy committee (where applicable), an online web service provider, re-insurers, medical and financial professionals and judicial or dispute resolution bodies.

We will only use information about your nominated preferred dependant(s) or legal personal representative in the event of your death.

In the future, we may contact you about new products or special offers. If, at any time, you do not want to receive this information you can opt out by telephoning 133 056 and quoting your plan and member number.

We may provide a financial adviser of your current or former employer plan with information about your membership such as your contact details, account balance and insurance cover so that they can contact you to discuss other financial products and services. If you do not want us to provide your information to a financial adviser for this purpose, please contact us. We do not give your personal details to any other external parties for marketing purposes.

You are entitled to request reasonable access to information we have about you. We reserve the right to charge an administration fee for collating the information you request.

For a copy of our policy on privacy refer to [axa.com.au](http://axa.com.au) or contact our Customer Service Centre on 133 056.

### Member declaration

I have been provided with and have retained for my use the current AXA's Business Super Rollover Section Product Disclosure Statement.

I agree to be bound by the terms and conditions of the Trust Deed of the Fund as amended from time to time.

I accept responsibility for the choices I have made on this form and acknowledge that the Trustee shall not be liable for any loss due to an inappropriate choice made by me.

I undertake to reimburse The National Mutual Life Association of Australasia Limited on demand in respect of any amount incorrectly paid to me.

I have read and understood the Privacy – use and disclosure of personal information statement. I consent to my personal information being collected and used in accordance with the Privacy – use and disclosure of personal information statement. I acknowledge that I can opt out from the use of that information for the purpose of direct marketing by calling 133 056.

Member's signature

Date

Please note that AXA will not be able to process your request unless mandatory sections 1 and 5 are completed.