



For the adviser to complete and submit with new plan documents

1 Plan details

Plan name [] Plan reference (if known) []

Total number of members submitted []

Have you applied to the superannuation product manager to have the member fee reduced? [] Yes [] No

Have you applied to the superannuation product manager for a plan asset management fee rebate? [] Yes [] No

2 Adviser details/commission splits

Adviser name [] Adviser number [] Comm split [] %

Adviser name [] Adviser number [] Comm split [] %

3 Commission percentages (Please tick a commission percentage for each commission type below):

FUM [] 0% [] 10% [] 20% [] 30% [] 40% [] 50% [] 60% [] 70% [] 80% [] 90% [] 100%
Up to 0.4% pa (may be higher in cases of a Plan Rebate). Applied to Funds under Management (FUM).

Regular contributions [] 0% [] 10% [] 20% [] 30% [] 40% [] 50% [] 60% [] 70% [] 80% [] 90% [] 100%
Up to 5%. Applied to all regular contributions paid into the fund.

Transfers [] 0% [] 10% [] 20% [] 30% [] 40% [] 50% [] 60% [] 70% [] 80% [] 90% [] 100%
Up to 5%. Applied to all transfers paid into the fund.

[]

In cases of a whole plan transfer from an external fund into Super Directions for Business, please indicate the name of the external fund.

Rollovers [] 0% [] 10% [] 20% [] 30% [] 40% [] 50% [] 60% [] 70% [] 80% [] 90% [] 100%
Up to 5%. Applied to all rollovers paid into the fund.

Special contributions [] 0% [] 10% [] 20% [] 30% [] 40% [] 50% [] 60% [] 70% [] 80% [] 90% [] 100%
Up to 5%. Applied to all special contributions paid into the fund.

Group Life [] 0% [] 10% [] 20% [] 30% [] 40% [] 50% [] 60% [] 70% [] 80% [] 90% [] 100%
Up to 20% of premiums. Applied to Death, TPD and Salary Continuance premiums.

4 Additional information if required (if insufficient space, please attach a memo)

[]

5 Same day sales (complete for unsupported members only)

Have you, within the previous 24 hours, sold another policy or membership to a customer:

- on the same site (eg house, workplace, flats), or
from the same community group (eg sporting club, ethnic association)?

[] Yes [] No Name of site/community group []

If yes, please tick the appropriate box(es) below:

- [] All the other policies I have sold on this site/to this community group within the last 24 hours have been risk policies.
[] I have previously provided life insurance advice to the prospective member.
[] The prospective member asked me to attend the site/community group.

If you cannot tick at least one of the boxes above, you cannot complete the sale today as it infringes the same day sale prohibition in the Life Insurance Code of Practice.

(Note: A risk policy has no savings element and will cover Life Insurance, Total and Permanent Disablement Insurance, Salary Continuance and Trauma Insurance only.)

6 Declaration

I declare that the above statement and information are correct and true and I acknowledge responsibility for their completeness and accuracy.

Name [] Telephone []

Signature [X] Date [] / [] / []