

# Application for spouse membership of the SA Metropolitan Fire Service Superannuation Scheme

#### About this form

We need you to fill out this form to let us know:

- Contributing spouse (i.e. SA Fire Service employee who will pay contributions on behalf of his or her spouse) to complete Step 1 of the form only.
- Nominated spouse (i.e. the person for whom contributions will be made) to complete Steps 2 to 6.

To find the information you need to complete this form just look in the Member Benefit Guide.

Once you've finished the form, don't forget to sign it and return it to the Manager, SA Metropolitan Fire Service Superannuation Scheme at 99 Wakefield St, Adelaide, SA 5000.

If you're unsure of your decisions, we recommend that you see a licensed financial adviser.

### Step 1 – Complete Personal Details – Contributing spouse Please print in black or blue pen, in uppercase, one character per box. Title Mr Mrs Ms Miss Other Given names Surname Membership number By signing this form as the standard member: • I acknowledge that any such contributions I make to the Scheme are for the benefit of my spouse (the spouse member) and cannot be repaid to me. I confirm that the spouse member is my spouse within the meaning of relevant Government legislation (as set out in the Member Benefit Guide), and if over the age of 67 and under age 75, is gainfully employed for at least 40 hours within 30 consecutive days during the financial year in which the contribution is being made. I will advise the Trustee if my nominated spouse ceases to be my spouse within the meaning of that legislation or, if between age 67 and 75, ceases to be gainfully employed for at least 40 hours within 30 consecutive days during the financial year in which the contribution is being made. I confirm that I am not entitled to a tax deduction for these spouse contributions. I understand and consent to my information being collected, disclosed and used in the manner set out in this form. Signature Date X



Step 2 – Complete personal details – Spouse mem	ber
Title Mr Mrs Ms Miss Other Date of birth	/
Given names	
Surname Surname	
Home address	
Suburb	e Postcode
Daytime Telephone Fax	
E-mail - see note below	
Providing your email address	
In the future the Trustee anticipates providing information such as annual reports, member st	
of any material changes or occurrence of significant events electronically, rather than in w If this format becomes available and you'd like to receive this information electronically pleas	
Step 3 – Contributions	
To make contributions please complete the form titled Making a contribution on behal	f of your spouse included with the
Member Benefit Guide or contact the Scheme on (08) 8204 3826 for a form.	
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Step 4 – Choose your investment options	
(Accumulation Benefit Only)	
You can choose any of the investment options detailed below. Please ensure that all percentages automatically be invested in the default investment option, which is the High Growth option.	add to 100%, otherwise you will
I'd like to invest in the following investment options:	
High Growth (default)	%
Balanced	%
Moderate	— — — — — — — — — — — — — — — — — — —
Conservative	%
Capital Defensive	%
Cash	%
TOTAL	1 0 0 %
Forms received by the Trustee by 5:00pm Thursday will be processed at the next declared unit pri	ce, generally on the following Monday.
Please note that until your Application form has been received and processed you will remain in t	he High Growth option (the Scheme's

Please note that until your Application form has been received and processed you will remain in the High Growth option (the Scheme's default investment option).



# Step 5 - Nominate your beneficiaries - Spouse member to complete

# Who'll get your super if you die while you're in the SA Metropolitan Fire Service Superannuation Scheme?

Should I die while a member of the Scheme, I'd prefer my death benefit to be paid to the following people in the proportions shown. **The Trustee is not legally bound by your wishes but will take them into account.** 

Name		
Relationship to you* Proportion of payout		%
Name		
Relationship to you* Proportion of payout		%
Name		
		-
Relationship to you* Proportion of payout		%
Name		
Relationship to you* Proportion of payout		%
Name		
		1
Relationship to you* Proportion of payout		%
TOTAL	1 0 0	%

- \* Must be a Dependant or be your legal personal representative (the executor of your Will), if you wish to have your benefit payable to your estate. A dependant is defined as:
- your spouse whether by marriage, a de facto relationship (including same-sex partners) or a registered relationship under a law of State or Territory (including same-sex partners)
- your children including step-children, adopted children and your spouse's children, and
- any other person who the Trustee considers is wholly or partially dependent on you at the time of death.



### Step 6 – Provide your tax file number

### Don't pay more tax than you have to – let us know your tax file number.

Your tax file number is confidential and you don't have to give it to the SA Metropolitan Fire Service Superannuation Scheme. It is not an offence to not provide your tax file number. However, you may pay more tax than you have to if you don't supply it

My tax file number is:		-		-		
Special note:						

In line with the Superannuation Industry (Supervision) Act 1993, the Trustee of the SA Metropolitan Fire Service Superannuation Scheme is authorised to ask for your tax file number. The Trustee will only use your tax file number for lawful purposes. These purposes may change in the future if there are changes to legislation.

The Trustee may pass your tax file number to any other super fund or account to which your super is transferred in the future unless you request in writing that this not be done.

By providing your tax file number:

- the Trustee will be able to accept all types of contributions made by or for you (some limits may apply)
- you can avoid paying tax at a higher rate than would otherwise apply on your contributions
- you can avoid paying tax at a higher rate than would otherwise apply on your benefit, and
- it will be easier for you to find your super in the future and ensure that you receive all of your super benefits when you retire.

Choosing not to provide your tax file number is not an offence. However, if you don't provide your tax file number now or in the future:

- the Trustee will only be able to accept contributions made for you by your employer. No other contributions, for example, after-tax contributions, can be accepted
- you may pay more tax on contributions made for you by your employer. In some circumstances you may be able to claim back this additional tax, however time limits, fees and other rules may apply
- you may pay more tax on your super benefit than you would otherwise (although you can claim this back when you lodge your tax return).

### **Your Privacy**

The Scheme is administered by us along with our service provider, Mercer Outsourcing (Australia) Pty Ltd. We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information about the other products and services offered by us and our related companies. If you do not wish to receive marketing material, please contact the Manager on (08) 8204 3826.

Our Privacy Policies are available to view at www.sametrofiresuper.com.au or you can obtain a copy by contacting the Manager on (08) 8204 3826.

If you do not provide the personal information requested, we may not be able to manage your superannuation.

We may sometimes collect information about you from third parties such as your employer, a previous super fund, your financial adviser, our related entities and publicly available sources.

We may disclose your information to various organisations in order to manage your super, including your employer, our professional advisors, insurers, our related companies which provide services or products relevant to the provision of your super, any relevant government authority that requires your personal information to be disclosed, and our other service providers used to assist with managing your super.

In managing your super your personal information will be disclosed to service providers in another country, most likely to Mercer's processing centre in India. Our Privacy Policies list all other relevant offshore locations.

Our Privacy Policies set out in more detail how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact the Manager on (08) 8204 3826 or write to our Privacy Officer, SA Metropolitan Fire Service Superannuation Scheme, GPO Box 98, Adelaide, SA 5001.



## Step 7 – Sign the form – Nominated spouse

Don't forget to return this form to the Scheme. You may like to make a copy for your records.

To be completed by the nominated spouse. This is the person for whom contributions are to be made. By signing this form I:

- acknowledge that I have received all information I require in order to understand the benefits of spouse membership.
- apply to be a spouse member of the SA Metropolitan Fire Service Superannuation Scheme.
- accept that I will be bound by the provisions of the trust deed and rules which govern the operation of the Scheme.
- acknowledge that if I've provided my email address details in this application form, the Trustee may, at its discretion, use that email address to send information, including any annual reports, member and exit statements and notices of any material changes or the occurrence of significant events, by electronic means.
- acknowledge that I have read and understood the Member Benefit Guide and agree to be bound by it.

• understand and consent to my information being collected, disclosed and used in the manner set out in this form.			
Signature	Date		
X			