REI Super

Application to make a lump sum contribution

About this form

We need you to fill out this form if you wish to pay a lump sum contribution into REI Super. This information will be used to identify you and allocate the money to your Member Voluntary Account.

Note that you must have provided your Tax File Number (TFN) to REI Super before you can make after-tax contributions to REI Super. If your TFN has not been provided, this contribution cannot be accepted by REI Super and will be returned to you.

If you are uncertain as to whether or not you have provided your TFN, you can check these details by contacting the Helpline on 1300 134 433.

If you need help

For assistance call the Helpline on 1300 134 433.

Step 1 – Complete your personal details

Please print in black or blue pen, in uppercase, one character per box. A ✓

Title Mr ○ Mrs ○ Ms ○ Miss ○ Other ☐☐☐ Date of birth ☐☐ / ☐☐ / ☐☐☐☐

Given names

Surname

Home address

Suburb State Postcode

Daytime Telephone

☐☐ - ☐☐☐☐☐☐☐☐

Membership number

Current Employer

Email Address

Continued over

Issued by Rei Superannuation Fund Pty Ltd ABN 68056044770, AFS Licence No. 240569 RSE Licence No. L0000314 as Trustee for Rei Super ABN 76641658449, Registration No. R1000412.

Step 2 – Payment details

I request the Trustee of REI Super to accept a lump sum contribution of $ ___,___.___ as an after-tax contribution*.

Mercer use only

REISC 11501

Please make the cheque payable to REI Super

Cheque number

Please deposit this amount into the investment option chosen below.

☐ Trustee Super Balanced ☐ Super Growth

☐ Super Stable ☐ Super Cash

(Please refer to the REI Super PDS or website for further details on investment choices.)

* Legislative limits apply to the amount of non-concessional (after-tax) contributions that can be made to REI Super as a single payment. If your contribution exceeds those limits, the excess will be returned to you.

Step 3 – Sign the form

Your application will not be accepted unless you have signed this declaration. By signing this form I:

- acknowledge that I have read and understood the information provided in the Product Disclosure Statement on Contributions, and agree to be bound by it.
- confirm that I am eligible to make this personal lump sum contribution to REI Super.
- accept that I will be bound by the provisions of the trust deed which govern the operation of REI Super.
- accept that this contribution will be subject to the preservation rules as required by legislation.
- understand that this contribution will be returned to me if I have not provided my Tax File Number to REI Super.
- understand that nothing on this form constitutes financial advice or recommendations.
- understand that my personal information will be handled by the Trustee to process my lump sum contribution. For this purpose, my personal information may pass between the Trustee of REI Super and its administrator and professional advisers, insurers, government bodies, my employer and other parties as required, including the Trustee of any other super fund my super is transferred to. I consent to the handling of my personal information in this manner. If I do not give this information, my contribution choice will not be implemented. I can access my information by contacting the Privacy Officer of REI Super.

Signature ✗

Date __ / __ / ____

Please return your completed form to the Fund Administrator, REI Super, GPO Box 4303, Melbourne, VIC 3001.