

MEMBERSHIP APPLICATION FORM

Follow the Steps 1 to 12 below to complete this form if your employer is, or will be, a member of REI Super and making contributions on your behalf.

Before you sign this application form, the Trustee is obliged to give you a full copy of the Guide to REI Super, which is also known as a Product Disclosure Statement (PDS). This is a summary of the important information relating to the Fund. The Guide will help you to understand the product and decide if it is appropriate for your needs.

The latest version of the Guide has a publication date of 1 February 2009. If this document is not attached to this application form, please phone 1300 13 44 33 to obtain a copy.

**When you have completed and signed the form, please return it to your employer or post to:
GPO Box 4303, Melbourne VIC 3001.**

STEP 1: YOUR DETAILS

Mr Mrs Ms Miss Dr Other

Date of birth / /

Surname

Given names

Residential address

Suburb State Postcode

Contact telephone number Mobile

()

Email address

Please note if you provide your email address we may use this to provide you with Fund communications where appropriate.

STEP 2: TAX FILE NUMBER NOTIFICATION

Don't pay more tax than you have to - provide us with your tax file number.

My Tax File Number is:

REI Super is required by law to ask you for your tax file number (TFN). Your tax file number is confidential and you don't have to give it to REI Super. It is not an offence to decline to provide your tax file number to your super fund. However, you may pay more tax than you have to if you don't supply it.

If you choose to tell us your tax file number, you are allowing REI Super to use it to:

- > Find or identify your superannuation benefits where other information is insufficient;
- > Determine the tax payable on any contributions or benefits;
- > Pass your tax file number to the ATO when you receive a benefit or have unclaimed super after reaching pension age, and
- > Pass your tax file number to any other super fund to which your super is transferred in the future unless you tell REI Super in writing not to do so in future.

If you do not provide the Fund with your tax file number, either now or later:

- > You may pay more tax on your contributions and benefits than you would otherwise (if this happens you may be able to claim the extra tax back later);
- > It may be more difficult to find your superannuation benefits in the future or to amalgamate any multiple superannuation accounts.

The lawful purposes for which your tax file number can be used and the consequences for not quoting your tax file number may change in future as a result of legislative change. If you wish to provide your tax file number to the Trustee please complete this form and return it to the Fund. Please note that your signature will serve as an acknowledgement that you understand the circumstances in which your tax file number may be collected and used.



MEMBERSHIP APPLICATION FORM

CONTINUED



STEP 10: PROOF OF IDENTITY

- I have attached a certified copy of my driver licence or passport **OR**
- I have attached certified copies of both:
- Birth/Citizenship Certificate or Centrelink Pension Card **AND**
 - Centrelink payment letter, Government or local council notice, or utility bill (<1 year old) with name and address

See page 48 of the Guide for more details.

STEP 11: DECLARATION AND SIGNATURE

Your signature below indicates that you have read, understood and agree to the following statements:

- > I apply to become a member of REI Super on the terms and conditions contained in the Trust Deed and Rules of the Fund. I understand that the Trust Deed and Rules can be inspected on request.
- > I have received and read the information provided to me about the Fund, in particular, the Guide dated 15 November 2008.
- > I have read and understood my Duty of Disclosure in the **Insurance** section of the Guide. I understand that this duty applies until notification of acceptance of any insurance cover.
- > I understand that my personal information will be handled by the Fund to provide and manage my superannuation and without this information the Fund may not be able to provide my superannuation benefits and choices. For this purpose my personal information may pass between the Fund and the Fund's administrator and professional advisors, insurers, government bodies, my employer and other parties as required, including the trustee of any other fund I may transfer to. I may access my information by contacting the Fund's Privacy Officer.
- > The choices I have indicated on this form will remain in force until I advise the Trustee otherwise, with the effective date of change being as advised by the Trustee.
- > The information that I have supplied on this application form is true and correct at the date of signing and I will notify the Trustee immediately if any of this information changes.
- > I consent to the Fund providing me with information about benefits provided by third parties, including home loans and other financial services and products by Members Equity. (If you do not want information sent to you, you simply contact the Fund administrator).
- > Where my email address has been provided I consent to receiving Fund information electronically where this is feasible.

Signature

Date

/ /

STEP 12: EMPLOYER CONFIRMATION (TO BE COMPLETED BY THE EMPLOYER)

Employer trading name

Postal address

Suburb

State

Postcode

Employer code

Date joined employer

/ /

Date joined REI Super

/ /

Important note: Insurance cover will NOT commence until an employer contribution is received.

EMPLOYMENT STATUS

- Permanent full time Permanent part-time: hours per week Casual
- Other (please advise)

I hereby confirm this employee was:

- at work **OR** not at work on the date joined employer.

Employer representative name

Employer representative signature

Date

/ /

