

# Advice fee deduction authority form

After deducting this fee, you must leave a minimum balance of \$10,000 in your NGS Super account.

You can ask NGS Super to deduct the portion of a personal financial advice fee directly related to your super in the NGS Super fund from your super or income stream account.

## If you need help

For assistance call NGS Super Customer Service Team on **1300 133 177**.

Any insurance cover you have will cease if there are insufficient funds in your super account to cover premium deductions

Please send your completed form to:

**NGS Super GPO Box 4303 MELBOURNE VIC 3001**

or email to: **NGSAdminTeam@mercero.com**

### Step 1. Complete your personal details

Please print in black or blue pen, in capital letters.

NGS member number                      Title  Date of birth  /  /

Given names

Surname

Residential address (must be advised)

Suburb  State  Postcode

Postal address (if different to above)

Suburb  State  Postcode

Phone number  -  Mobile  -

Personal email

Member Category:

- Industry and Personal
- Cuesuper Defined Benefits Plan
- Pension
- Penleigh & Essendon Grammar Plan
- SA Catholic Plan

#### Superannuation fund details

Fund name: NGS Super

Phone: 1300 133 177

Email: **NGSAdminTeam@mercero.com**

Website: **ngssuper.com.au**

## Step 2. Adviser details — to be completed by the adviser

Please attach a copy of the fee invoice

Adviser name

Company name/authorised representative of

AFSL number

ASIC Financial adviser register number

Telephone

 - 

Email

Company address

Suburb

State

Postcode

I wish to have payment made by:

Cheque

EFT

Remittance advice via:

Email

Post

I/We hereby agree for all payments by NGS Super for goods and services supplied to be made by way of direct credit to the bank account details below.

I/We hereby guarantee that the following details are correct, and agree to indemnify NGS Super against any loss or damage suffered if the details provided are incorrect.

The information provided will be used solely for financial management and will not be used for any other purpose.

### Banking details for Electronic Funds Transfer (EFT) payment

Name of Institution

BSB

Account number

Account name

### Adviser declaration and signatures

As the financial adviser I declare that:

- the advice fee being requested is in relation to the member's account held in NGS Super and I can confirm this fee includes the following services (*please list types of services provided*):


- the service arrangement for this advice fee is a one-off advice fee.
- I understand NGS Super may be in contact with me in relation to this advice fee arrangement and may seek confirmation that services have or will be provided.

Signature  
of adviser

Date

 /  /

### Step 3. Consent for advice fees to be deducted from my super account — to be completed by the member

NGS Super is legally required to get your written consent before the financial advice fee can be deducted from your super account. Please complete and sign the below section to provide your consent.

One-off advice fees are only able to be deducted from a member's account held in this fund.

Please note, we may not be able to process your request if:

- the fee to be deducted would leave your account with a balance payout of less than \$10,000.
- you have a defined benefit account, a personal advice fee can only be deducted from any rollover or additional voluntary contribution accounts you may have and you must retain a leaving service balance of at least \$10,000.

Please complete the below and include all applicable information:

One-off advice fee (maximum of \$5,000)

\$  ,    .

Date of service

/   /

One-off advice fees will be deducted from your account at the time of receiving this form. Your consent will expire once the deduction has been processed and your adviser will have to ask you for your consent before any further advice fees are deducted from your NGS Super account.

By signing this form, I consent and confirm the following:

- the services provided by the financial advice that this fee relates to is in relation to my account held with NGS Super.
- I am aware that if I am not satisfied with the services described by my adviser I do not have to sign this consent.
- I can withdraw my consent by contacting NGS Super 1300 133 177 or by emailing [NGSAdminTeam@mercer.com](mailto:NGSAdminTeam@mercer.com) and understand I must contact NGS Super before the amount has been deducted from my account.
- I consent for the advice fees requested on this form be deducted from my NGS Super account.

Member signature

Date

/   /

#### Attach proof of identity

For identification purposes, you **MUST** attach a certified copy of either your driver's licence or passport (or acceptable alternatives).

You can have these documents certified by a number of people including either a full-time teacher or by a post office employee with more than two years' service. For a full list of people who can certify documents and acceptable alternative documents, please visit [ngssuper.com.au/poi](http://ngssuper.com.au/poi)

#### How to cancel your advice fee?

You should speak to your adviser if you are not satisfied with the services provided before signing this form.

If you no longer wish to have the advice fee deducted from your account you will need to contact us before the amount has been deducted from your account.

To withdraw your consent to the deduction of fees from your super account contact NGS Super.

Phone: 1300 133 177

Email: [NGSAdminTeam@mercer.com](mailto:NGSAdminTeam@mercer.com)

In writing: NGS Super GPO Box 4303 Melbourne VIC 3001

## Step 4. Sign the form

I confirm that:

- I consent for the advice fee as detailed above to be deducted from my super account and I have signed the consent for this advice fee
- the amount to be deducted from my account is solely in relation to advice provided to me in relation to my super benefits in NGS Super

I understand and agree that:

- the fee nominated will be deducted from my account by NGS Super's administrator on receipt of all required information
- information contained in this form will be used by NGS Super to process my request to deduct a personal advice fee from my super or income stream account, and if necessary, to update my NGS Super member records so that NGS Super can contact you more efficiently in the future regarding your account. For this purpose, personal information may pass between the trustee of NGS Super, and its administrator and other parties as required. I consent to the handling of my personal information in this manner. I can access my information by contacting the Privacy Officer of NGS Super
- if I provided my email address in this form, NGS Super may, at its discretion, use that email address (as amended and notified to NGS Super from time to time):
  - to send me information concerning my super, including any annual reports, member and exit statements, notices of material changes or occurrence of significant events and other member communications or publications; and
  - for marketing and research purposes, including sending me information about other financial products or services offered by the trustee or any of its related parties (unless I have requested you not to do so by contacting us on **1300 133 177**).
- the trustee may provide any member communications (including any annual reports, member and exit statements, notices of material changes or occurrence of significant events and other member publication) and/or marketing and research material that are permitted by law to me electronically by:
  - sending it to me by email (which may include a link to a website from where it can be downloaded) where I have provided my email address including any email address provided by any other person on my behalf including my employer; and/or
  - making it available to me on a website from where it can be downloaded
- the value of my super in NGS Super will decrease by the amount of the fee paid from my super or income stream account in accordance with my request
- NGS Super may not be able to action my request where the trustee has been notified of family law proceedings in relation to my super or income stream

I agree that:

- my request will not be processed
  - if I have not completed and signed Step 3 of this form or
  - the one-off advice fee is more than \$5,000 or
  - my current balance is less than \$10,000 or my balance remaining after the deduction of the fee will be less than \$10,000.
- the trustee may use my email address as provided by myself or any other person on my behalf including my employer to communicate with me in respect of any correspondence it deems appropriate
- I understand and agree that I am solely responsible for the selection and appointment of my financial adviser. I acknowledge that NGS Super is not responsible for the advice provided and will accept no liability for any loss or claim that may result from or in connection with the advice provided by the financial adviser
- I understand and consent to my information being collected, disclosed and used by NGS Super in the manner set out in this form.

Member signature

Date

 /  / 

## Privacy Collection Statement

NGS Super Pty Limited ABN 46 003 491 487 of **Level 4, 14 Martin Place Sydney NSW 2000** collects personal information from you (or from third parties such as your employer or another super fund) to manage your NGS Super account, keep you informed, improve our products and services or take action on a matter you have contacted us about. If we don't have your personal information, we may not be able to perform these services. We may be authorised to collect your personal information by certain laws, including laws relating to superannuation, taxation and anti-money laundering/counter-terrorism financing.

We disclose personal information as required to manage the Fund, to service providers (including our administrator, our insurer and professional advisers), employers or parties required by law. Personal information may be accessed by service providers overseas, most likely by our administrator's processing centre in India. For any other offshore locations, details of how to access and change your personal information and the privacy complaints process, go to [ngssuper.com.au/pcs](https://ngssuper.com.au/pcs) and [ngssuper.com.au/privacy](https://ngssuper.com.au/privacy) or call us on **1300 133 177**.