

# Consent to deduct advice fee form



You can request the trustee to deduct from your super the portion of a personal financial advice fee directly related to your REI Super account. **This option is available only in respect of personal financial advice provided by a Guideway Financial Services financial adviser.**

## STEP 1: COMPLETE YOUR PERSONAL DETAILS

\*Title  Mr  Mrs  Ms  Miss  Dr  Other

\*Date of birth  /  /

\*Given names

\*Surname

\*Postal address

\*Suburb  \*State  \*Postcode

Contact telephone number – Business hours (  )

Contact telephone number – After hours (  )

\*Mobile

Membership no.

\*Email address

## STEP 2: CONSENT FOR ADVICE FEES TO BE DEDUCTED FROM MY REI SUPER ACCOUNT (to be completed by the member)

REI 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:

1. The fee to be deducted would leave your accumulation super account with a leaving service payout of less than \$5,000.
2. You have already had an advice fee deducted in the last 12 months.

Please select from the following options and include all applicable information (tick box):

**One-off advice fee** inclusive of GST \$  ,   ,   .    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 REI 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 REI 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 the fund on 1300 13 44 33 or by emailing [admin@reisuper.com.au](mailto:admin@reisuper.com.au) and understand I must contact the fund before the amount has been deducted from my account.
- I consent for the advice fees requested on this form be deducted from my REI Super account and paid to my adviser.

\*Member Signature

\*Date

/  /



# Consent to deduct advice fee form cont...

## ▶ HOW TO CANCEL OUR ADVICE FEE SECTION

**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 REI Super by:

- Phone on 1300 13 44 33
- Email to [admin@reisuper.com.au](mailto:admin@reisuper.com.au)
- In writing by mail to GPO Box 4303 Melbourne VIC 3001

## ▶ STEP 3: ATTACH A COPY OF INVOICE

You must attach a copy of the invoice issued by Guideway which shows the fee charged for the REI Super financial advice you received in relation to your interest in REI Super. Failure to attach a copy of the invoice means that the trustee will not be able to process your request.

## ▶ YOUR PRIVACY

The Fund is administered by us along with our service provider, Mercer Outsourcing Australia Pty Ltd (Mercer). 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 us on **1300 13 44 33**.

Our Privacy Policy is available to view at [reisuper.com.au](http://reisuper.com.au) or you can obtain a copy by contacting us on **1300 13 44 33**.

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 advisers, 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 Policy sets 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 us on **1300 13 44 33** or write to our Privacy Officer, **GPO Box 4303, Melbourne VIC 3001**.

## ▶ STEP 4: SIGN THE FORM

I confirm that:

- The amount to be deducted from my super account is solely in relation to advice provided to me in relation to my super benefits in REI Super
- 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.

I understand that:

- The fee nominated will be deducted from my super account by the trustee's administrator on receipt of all required information
- If I have provided my email address in this form the trustee may, at its discretion, use that email address to send me information concerning my super including any annual reports, member and exit statements, notices of material changes or significant events, and member publications
- The trustee may provide some or all of the member communications electronically either by:
  - a) sending it to me by email (which may include a link to a website from where it can be downloaded) where I have provided an email address; and/or

b) making it available to me on a website from where it can be downloaded

- The value of my super in REI Super will decrease by the amount of the fee paid from my super account in accordance with my request
- The trustee may not be able to action my request where the trustee has been notified of family law proceedings in relation to my super

I agree that:

- My request will not be processed if:
  - a) I have not completed and signed Step 2 of this form; or
  - b) the amount requested in Step 2 to be paid from my super account balance in REI Super does not correspond with the fee charged on the Guideway invoice for the REI Super financial advice I received in relation to my interest in REI Super
  - c) my current balance is less than \$5,000; or
  - d) The balance remaining in my super account after the deduction of the fee will be less than \$5,000
- The trustee may use my email address to communicate with me in respect of any correspondence it deems appropriate
- I understand and consent to my information being collected, disclosed and used in the manner set out in this form

\*Member Signature

X

\*Date

/ /



# Consent to deduct advice fee form cont...

## ADVISER DETAILS (to be completed by the advisor)

\* Adviser name

\* Business Name

\* AFSL Number

\* ASIC Financial Adviser Register Number

Contact telephone number

(  )

\*Mobile

\*Email address

### Adviser declaration and signature

As the financial adviser I declare that:

- The advice fee being requested is in relation to the members account held in REI 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 the Trustee may be in contact with me in relation to this advice fee arrangement and may seek confirmation that services have or will be provided.

\*Member Signature

\*Date

\* Indicates fields that MUST be completed.

## READY TO SEND US YOUR FORM?

Once you have completed and signed this form, please either:

Post: GPO Box 4303 Melbourne VIC 3001

Email: [admin@reisuper.com.au](mailto:admin@reisuper.com.au)

## WE'RE HERE TO HELP

If you need any assistance with filling out this form, or have any questions about super, please feel free to call us on **1300 13 44 33**.

