

# Bendigo SmartStart Member Advice Fee Form

# Bendigo Superannuation

Use this form to add, change or renew a Member Advice Fee, as negotiated with your financial adviser, for the following products:

- Bendigo SmartStart Super®
- Bendigo SmartStart Pension®

By completing this form, you are providing us with written consent for advice fees to be deducted from your super and/or pension account. You may withdraw your consent at any time by notifying us in writing.

Advice fees can only be deducted from your super and/or pension account if they relate to advice you receive about your super or pension benefits, insurance cover held within super, and/or investments.

A separate form will need to be completed for each account you hold in Bendigo SmartStart Super and/or Bendigo SmartStart Pension.

## Step 1 Member details

Member number

Title  Surname

Given name(s)

Date of birth  /  /

## Step 2 Advice fees

I want to: (Tick one)

- Set up a new Member Advice fee – One-off (complete Section A)
- Set up or change Member Advice Fee- Ongoing\* (complete Section B)
- Renew my existing Ongoing Member Advice Fee arrangement\* (complete Section C)

### Section A – Member Advice Fee – One off

As agreed with my nominated financial adviser, I consent to the below one off fee to be deducted from my account for financial advice.

\$  ,  .  (max \$5,500 inclusive of GST per request)

**Please select the services being provided (required for Bendigo SmartStart Super and Bendigo SmartStart Pension):**

- |   |  |
|---|--|
| <input type="checkbox"/> Review of your account               | <input type="checkbox"/> Strategic superannuation advice |
| <input type="checkbox"/> Investment advice on your account    | <input type="checkbox"/> Contribution strategy           |
| <input type="checkbox"/> Insurance in superannuation strategy | <input type="checkbox"/> Withdrawal advice               |

### Section B – Member Advice Fee – Ongoing

Commencement date<sup>^</sup>  /  /

Consent end date (required)  /  /

<sup>^</sup>the commencement date must be a future date or the date we accepted and processed the form, whichever is later.

The consent end date is the date when all ongoing Member Advice Fees will end if we have not received your annual consent to continue. Your consent to an ongoing Member Advice Fee arrangement ends 150 days after the next anniversary date.

### Percentage-based

% Up to a maximum of 2.2% per annum (inclusive of GST) of your account balance.

Your adviser has estimated a fee of \$

This Member Advice Fee will be calculated daily by applying the percentage above against your daily account balance, deducted monthly from your account and paid to your financial adviser.

**OR**



- Will not accept electronic instructions unless it is accompanied by my scanned or faxed signature;
- Is not responsible for any loss or delay that results from a transmission not being received by Bendigo Super;
- Will only process electronic instructions if they are received in full and have been fully signed by me;
- Will not accept a receipt confirmation from the sender's facsimile machine or computer as evidence of receipt of the instruction's unless the confirmation receipt clearly applies, on its face, to the specific instructions transmitted electronically (e.g. these instructions appear on the same page as the confirmation) and is not able to be tampered with;
- Will not compensate me for any losses relating to electronic instructions except to the extent of any negligence or bad faith on the part of Bendigo Super, unless required by law; and
- Does not take responsibility for any fraudulently or incorrectly completed or signed electronic instructions. In the event of any such fraud, I agree to release Bendigo Super from, and indemnify Bendigo Super against, all losses and liabilities whatsoever arising from Bendigo Super acting reasonably in good faith in accordance with any instructions received electronically bearing my member number and a signature purportedly mine.

Member Signature

Date

 /  / 

**Contact details:**

Bendigo Superannuation Pty Ltd

Bendigo SmartStart

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Melbourne VIC 3001

Phone: 1800 033 426

Email: [superannuation@bendigobank.com.au](mailto:superannuation@bendigobank.com.au)

Website: [www.bendigobank.com.au/super](http://www.bendigobank.com.au/super)

The trustee of Bendigo Superannuation Plan ABN 57 526 653 420 is Bendigo Superannuation Pty Ltd ABN 23 644 620 128 AFSL 534006, a subsidiary of Bendigo and Adelaide Bank Limited.