



ANZ Australian Staff Superannuation Scheme

Application to make lump sum contributions

About this form

We need you to fill out this form if you wish to pay a lump sum contribution into the ANZ Australian Staff Superannuation Scheme. 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 the ANZ Australian Staff Superannuation Scheme before you can make after-tax contributions to the Scheme. If your TFN has not been provided, this contribution cannot be accepted by the Scheme 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 on the website address or by contacting ANZ Staff Super on **1800 000 086**.

If you need help

For assistance call ANZ Staff Super on **1800 000 086** or refer to www.anzstaffsuper.com.

Step 1 – Complete your personal details

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



Title Mr Mrs Ms Miss Other

Date of birth / /

Given names

Surname

Postal address

Suburb

State

Postcode

Daytime Telephone

Mobile

E-mail

Membership number

Membership Section:

 Section A Section C RBA Section SCA Section

Step 2 – Payment details

I request the Trustee of the ANZ Australian Staff Superannuation Scheme to accept a lump sum contribution of

\$ as an after-tax contribution¹.

Administration
use only
11575
SA008

(Select an option)

I wish to make this payment by cheque. Please make the cheque payable to the ANZ Australian Staff Superannuation Scheme

Cheque number

Only cheques drawn on personal or joint accounts can be accepted - cheques on company accounts cannot be accepted for personal non-concessional (i.e. after-tax) contributions.

I wish to contribute to the Scheme via BPay. The Scheme's BPay biller number and your reference number are located in the secure section of the Scheme's website www.anzstaffsuper.com.

Note:

1. Legislative limits apply to the amount of non-concessional (after-tax) contributions that can be made to the Scheme 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
- acknowledge I have read the "Protecting members' privacy" statement on this form (see below)
- consent to the collection, use, storage and disclosure of my personal information as described in the "Protecting members' privacy" statement on this form
- confirm that I am eligible to make this personal lump sum contribution to the ANZ Australian Staff Superannuation Scheme i.e. I am:
 - under age 65; or
 - between age 65 and 74 (inclusive) and I have been gainfully employed for at least 40 hours in a period of 30 consecutive days during the financial year in which the contribution is being made
- accept that I will be bound by the provisions of the trust deed which govern the operation of the ANZ Australian Staff Superannuation Scheme
- accept that this contribution will remain preserved until my retirement
- understand that this contribution will be returned to me if I have not provided my Tax File Number to the Scheme
- understand that nothing on this form constitutes financial advice or recommendations.

Signature

Date

/ /

Please return your completed form to:

**ANZ Staff Super
GPO Box 4303
Melbourne VIC 3001**



Protecting members' privacy

The Trustee, ANZ Staff Superannuation (Australia) Pty Limited, seeks to take all reasonable steps to protect members' privacy and the confidentiality of members' personal information.

The Scheme Administrator, Mercer, collects (on behalf of the Trustee) personal information directly from members and their employers. Sometimes information about you may be collected from other third parties such as a previous superannuation fund, your financial adviser or publicly available sources. We collect, use and disclose personal information about you to provide and manage your account in the Scheme and give you information about your super, or as required by super and tax laws.

If you do not provide the personal information requested or it is incomplete or inaccurate, we may not be able to manage your account properly and processing of transactions to, from or in relation to your account may be delayed.

Members' personal information is kept confidential, but may be disclosed by the Trustee or Scheme Administrator to third parties, such as the Scheme's actuary, Insurer, medical consultants, underwriter, legal adviser and auditor and other external service providers who are contracted to assist with administering members' benefits. It may also be disclosed where expressly authorised or required by law, for example to government agencies such as the Australian Taxation Office and Superannuation Complaints Tribunal. Members' personal information may also be disclosed to the Group Superannuation Department of ANZ for the purposes of administering members' benefits or resolving members' inquiries or complaints.

Members' personal information may be disclosed to related entities of the Scheme Administrator located overseas (in particular, its wholly owned Global Operations Shared Services function in India) as part of the day-to-day provision of administration services.

The Trustee's Privacy Policy Statement contains more detail about how we deal with your personal information and information about how you can access and seek correction of information we hold about you. It also includes information about how you can lodge a complaint about how we've dealt with your personal information and how that complaint will be handled.

If you have any queries in relation to privacy issues, please contact:

ANZ Staff Super
GPO Box 4303
Melbourne VIC 3001
Telephone: 1800 000 086
Facsimile: 03 9245 5827
Email: anzstaffsuper@superfacts.com

The Trustee's Privacy Policy Statement is available on the Scheme's website www.anzstaffsuper.com or from ANZ Staff Super by calling 1800 000 086. You can also access the Scheme Administrator's privacy policy on the Scheme's website.

