

# Internal transfer within the Fund

Use this form to request a transfer within smartMonday superannuation products. Transferring can have an impact on your insurance, tax, fees and investments. No exit or entry fees apply to this transfer. We recommend you seek financial advice before completing this form. For more information, see the relevant *Product Disclosure Statement (PDS)* and/or speak with your financial adviser.

## Important information

If you have any questions, please call us on **1300 880 588** or email [enquiries@smartMonday.com.au](mailto:enquiries@smartMonday.com.au)

For more information go to our website [smartMonday.com.au](http://smartMonday.com.au)

- **Adviser authority**—if you wish to transfer or appoint a financial adviser to your new account please ensure your adviser completes *Your adviser details*.
- **Insurance cover**—if you held insurance in your current account with AIA Australia your death cover and total and permanent disablement (TPD) cover will be transferred to your new account. Your occupation rating will remain the same unless you advise us otherwise by completing an *Insurance update* form available on our website [smartMonday.com.au](http://smartMonday.com.au) or by calling us on 1300 880 588. If you have income protection in your smartMonday PRIME account and wish to maintain this, please complete the *Continuation of income protection* form.
- **Investment strategy**—the managed investment strategy you have selected for your current account will transfer to your new account. You can change your strategy at any time by completing the relevant *Switching managed investment options* form (available on our website [smartMonday.com.au](http://smartMonday.com.au) or by calling us on **1300 880 588**) or by [logging into](#) your account online.

## Your details

Title	Given names		
<input type="text"/>	<input type="text"/>		
Surname			
<input type="text"/>			
Date of birth (DD/MM/YYYY)	Sex (M or F)		
<input type="text"/>	<input type="text"/>		
Postal address			
<input type="text"/>			
Suburb	State	Postcode	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Telephone	Mobile		
<input type="text"/>	<input type="text"/>		
Email			
<input type="text"/>			

Send your completed form to: smartMonday, Reply Paid 1949, Wollongong DC, NSW 2500 (no stamp required).

smartMonday is the business name of the Aon Master Trust ABN 68 964 712 340 (the Fund) which has been registered by Aon Hewitt Limited ABN 48 002 288 646 AFSL 236667 as sponsor of the Fund. The trustee of the Fund is Equity Trustees Superannuation Limited ABN 50 055 641 757 AFSL 229757 RSE Licence L0001458. smartMonday PRIME, smartMonday DIRECT and smartMonday PENSION products are part of the Fund.

## Your current membership details

Please select the appropriate option below.

smartMonday DIRECT member—you are an individual member

smartMonday PRIME member—you are a member of an employer-sponsored plan

Employer name

Member number (if known)

## Your internal transfer

Please transfer the whole of my account balance to: (Tick one box)

smartMonday DIRECT

smartMonday PRIME

If you are transferring from smartMonday PRIME to smartMonday DIRECT membership, please give the date you terminated employment with the employer named above.

(DD/MM/YYYY)

## New employer details

Name of your new employer

Date commenced with new employer  
(DD/MM/YYYY)

Postal address of your new employer

Suburb

State

Postcode

Occupation

Industry

## Employment status

Full time  Permanent part time  Casual  None

Total hours worked per week

Daily duties (including % time on each duty, eg manual duties 100%)

## Authority to advise

If you wish to appoint an adviser or transfer your current adviser, please arrange for your adviser to complete the adviser details and adviser service fees sections below. Adviser fees are charged in line with the relevant PDS and/or agreement between you and your adviser.

## Adviser to complete

### Adviser details

Adviser code	Adviser name	
<input type="text"/>	<input type="text"/>	
Adviser dealer group	Telephone	
<input type="text"/>	<input type="text"/>	
Postal address		
<input type="text"/>		
Suburb	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

### Adviser service fees (inclusive of GST)

Select one option only

<input type="checkbox"/>	Ongoing fee (0%—2% pa of my total account balance)*	<input type="text"/>	%
<input type="checkbox"/>	Ongoing fixed-dollar fee (\$0—\$10,000 pa)*	\$	<input type="text"/>

and/or

<input type="checkbox"/>	Ad hoc fixed-dollar fee (up to \$10,000 pa)*	\$	<input type="text"/>
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\* The sum of ongoing and ad hoc fees is capped at the greater of \$10,000 pa or 2% pa of the total assets under advice across your super and pension products.

## Member to complete

Adviser's signature	Date (DD/MM/YYYY)
<input type="text"/>	<input type="text"/>

### Servicing authority

- I wish to appoint the adviser nominated above as my authorised and servicing adviser and request that:
  - ▢ all relevant information on my superannuation, investment accounts and insurance policy/s, or other financial information be released to my adviser
  - ▢ the servicing rights and responsibilities for any policies held on my behalf with your institution are passed on to my adviser and for this to be noted on the policy/s immediately.
- I authorise my adviser to access via the internet my benefit quote information, contribution history and other online details (with the exception of tax file number data) and to make enquiries on my behalf.
- I authorise the fees shown above to be deducted from my account balance and paid to my adviser in accordance with the relevant Product Disclosure Statement.
- I understand that I can cancel this authority at any time by giving written notice to the trustee at smartMonday, Reply Paid 1949, Wollongong DC, NSW 2500.



### Transactional authority

I also authorise my adviser:

when requested by me, to change or switch my investment options, update my contact details and address, issue a request to move money into or out of my account, and close my account

should I invest in the direct investment option (DIO), to manage and monitor my DIO account and make transactions in relation to my account including switching between investment strategies and purchasing or selling investments. I confirm that I have read and understood the [DIO Terms and conditions of use](#).

Member's signature

Date (DD/MM/YYYY)

### Privacy

Aon and the trustee are committed to protecting your personal information in accordance with the Australian Privacy Principles under the Privacy Act 1988 (Cth). We collect, use and disclose personal information to offer, promote, provide, manage and administer the many financial services and products we and our group of companies are involved in as set out in the [Aon Privacy Policy](#) and the [ETSL Privacy Policy](#). In order to do this, we may also share your information with other persons or entities who assist us in providing or promoting our services as set out in these Policies.

### Declaration and agreement

By signing this form I declare that:

- > I understand that, as a member of the relevant smartMonday product, I will be bound by the trust deed and the rules governing the Fund
- > I received a copy of the relevant Product Disclosure Statement (PDS) when I joined the Fund and I acknowledge that some terms and conditions (as set out in that PDS) may have changed over time
- > I have read the current relevant PDS which is designed to help me understand the product and to enable me to make an investment choice that is suitable for me
- > I have fully read this form and the information I have provided on this form is true and correct
- > I am aware that I may ask the trustee of the Fund for all information I need to understand my benefit entitlements in the Fund, and the effect of transfer on these benefit entitlements, and I do not require any further information
- > I understand the insurance cover and investment strategy transfers as outlined in *Important information* on page 1 of this form
- > I have read the [Aon Privacy Policy](#) and the [ETSL Privacy Policy](#), and consent to my personal (including sensitive) information being handled in accordance with these policies.

Member's signature

Date (DD/MM/YYYY)