

Superannuation standard choice form

For use by employers when offering employees a choice of fund and by employees to advise their employer of their chosen fund.

Give this completed form to your employer. Do not send it to smartMonday nor the Australian Taxation Office. Populate online or complete in pen using legible CAPITAL letters. Use X to mark boxes. Complete all fields marked with an asterisk (*).

Employee to complete

Step 1. Choice of superannuation fund

Give this completed form to your employer. Complete all fields marked with an asterisk (*).

I request all my future superannuation contributions to be paid to:

smartMonday, my employer's superannuation fund.
(Complete your personal details at step 2 and sign at step 5.)

My own choice of superannuation fund.
(Complete your personal details at step 2 then complete and provide documentation outlined at step 4 and sign at step 5.)

Step 2. Your personal details

Providing your TFN helps you keep track of your money, allows you to pay extra contributions, and makes sure your money is taxed at the concessional rate.

<input type="checkbox"/> Mr.	<input type="checkbox"/> Mrs.	<input type="checkbox"/> Ms.	<input type="checkbox"/> Dr	<input type="checkbox"/> Other
Given names*		Surname*		
<input type="text"/>		<input type="text"/>		
Date of birth* (DD/MM/YYYY)		My Tax File Number is:*		
<input type="text"/>		<input type="text"/>		
Employee identification number (if applicable):				
<input type="text"/>				

Step 3. Your employer-nominated superannuation fund

If you do not choose a different superannuation fund, your superannuation contributions will be paid into an account created for you in smartMonday, your employers preferred super fund.

Fund name	Unique Superannuation Identifier (USI) (if applicable)
<input type="text" value="smartMonday PRIME"/>	<input type="text" value="68964712340001"/>
Phone Number	Email address
<input type="text" value="1300 880 588"/>	<input type="text" value="enquiries@smartMonday.com.au"/>

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 (AHL) 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. This document has been prepared by AHL as sponsor and administrator of the Fund. smartMonday PRIME, smartMonday DIRECT and smartMonday PENSION products are part of the Fund.

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Step 4. Details of my chosen superannuation fund

Fund name*

Fund address*

Suburb

State

Postcode

Account name

Member number (if applicable)

Australian Business Number (ABN) (if applicable)

Unique Superannuation Identifier (USI) (if applicable)

Daytime phone

I have attached:

- > a letter from the Trustee stating this is a complying fund or retirement savings account (RSA) or, for a self-managed superannuation fund, a copy of documentation from the ATO confirming the fund is regulated
- > written evidence from the fund stating they will accept contributions from my employer, and
- > details about how my employer can make contributions to this fund.
Your employer is not required to accept your choice of fund if you have not provided the appropriate documents.

Step 5. Sign and date

When steps 1-5 are complete return this form to your employer and keep a copy for your own records'.

Signature

Date (DD/MM/YYYY)

Employer to complete

Company details

Give this form to your employee only after you have filled in your company details and signed/dated this section.

Business name*

ABN

Signature

Date (DD/MM/YYYY)

On return from employee

This section must be completed when the employee returns the form to you with a completed 'Section A'.

Date valid choice is accepted

Date you act on your employee's valid choice

Employers must keep the completed form for their own records for five years. Do not send it to the Australian Tax Office, the employer's nominated fund, or the employee's nominated fund.

Statement of compliance

smartMonday PRIME is part of the Aon Master Trust (the Fund), a fund which is a regulated superannuation fund as defined by the Superannuation Industry (Supervision) Act 1993 ('SIS'), and is administered as a complying superannuation fund under Section 45 of SIS. The trust deed governing the Fund allows benefits to be rolled over or transferred to other regulated superannuation funds and allows benefits to be transferred or rolled over into the Fund from other regulated superannuation funds. The fund can accept all types of super contributions within the meaning of the Superannuation Industry (Supervision) Act 1993. The Aon Master Trust is a registrable superannuation entity and may be nominated as a default fund, as it meets the minimum statutory insurance cover requirements. The trustee of the Fund is Equity Trustees Superannuation Limited ABN 50 055 641 757 AFSL 229757 RSE Licence L0001458.

Contact us

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