

Advice fee request

Important Note: Please provide us with as much information as possible. Please tick box where appropriate.

Use **BLOCK LETTERS** and **BLACK INK** when completing this form and ensure it is signed and dated. *DENOTES MANDATORY FIELD.

1. legalsuper member personal details

legalsuper Membership Number

Mr Mrs Ms Miss Dr Justice

Surname*

Given Name(s)*

Date of birth (dd/mm/yyyy)*

Gender

Male Female

Residential Address*

Town or Suburb*

State*

Postcode*

Postal Address* (if different from Residential Address above)

Town or Suburb*

State*

Postcode*

Email

Telephone Number

Mobile Number

2. Adviser details

Option 1 - If registered for legalsuper's Adviser Online:

legalsuper Adviser Number*

Option 2 - If not registered for legalsuper's Adviser Online:

Mr Mrs Ms Miss Dr

Surname*

Given Name(s)*

Postal Address*

Town or Suburb*

State*

Postcode*

Email*

Telephone Number*

Mobile Number

ASIC Financial Adviser Register Number*

Licensee*

ABN Number*

AFSL No.*

3. Adviser Licensee Payment details

legalsuper makes payment of the Advice fee to the financial adviser's Licensee (AFSL), and will provide the Licensee with a Recipient Created Tax Invoice (RCTI).

In order to make payment, we will require the Licensee's bank details as well as a signed 'Agreement for payment of Advice fee(s) and to receive Recipient Created Tax Invoice(s) (RCTI)' form from them. In the event we don't already have a signed agreement and/or banking details from your Licensee, please provide the below contact details for your Licensee:

Email*

Telephone Number*

Contact person(s)*

4. Advice fee request instructions*

Details of the entity paying the Advice fee and providing the RCTI:

Legal Super Pty Ltd. ABN 37 004 455 789.
Level 9, 627 Chapel Street. South Yarra VIC 3141.

Due to the nature of an RCTI, where legalsuper agrees to pay the Advice fee the Licensee will not be able to issue a tax invoice to the legalsuper member in respect to the Advice fee detailed on this form.

Initial/One-off Advice fee (including 10% GST) payable

\$ OR

% .00

Initial/One-off Advice fees payable to a Licensee will be paid on the 15th of the next month, or as soon as possible thereafter.

Ongoing Advice fee (including 10% GST) payable

Please provide the monthly amount:

\$ per month for months^ OR

% .00 per month for months^

Ongoing Advice fees payable to a Licensee in respect of a month will be paid on the 15th of the next month, or as soon as possible thereafter.

^Ongoing Advice fees are payable for no longer than 12 months. If number of months is not provided it will default to 12 months.

Payment of the Initial/One-off Advice fee and/or Ongoing Advice fee is subject to the Adviser Online Registration Terms and Conditions at legalsuper.com.au/adviser-online-terms as varied by legalsuper from time to time.

Important

legalsuper has limits for how much it will pay for Advice fees. In the event that a request exceeds the limits, legalsuper will contact you.

Advice fees cannot be paid under an *Advice fee request* form where a member holds only a legalsuper Guaranteed Income Account.

5. Member authorisation and declaration

- I understand that authorising an Advice fee request means that the Advice fee(s) detailed on this form will be debited from one of my legalsuper accounts.
- I understand that Advice fees can only be debited from my legalsuper account for advice related to my interest in the legalsuper superannuation fund.
- I acknowledge and accept that legalsuper reserves the right to decline payment of this Advice fee request at any time.
- I understand that I am able to discontinue any Advice fee arrangement at any time by notifying legalsuper.
- I understand that legalsuper can only pay Advice fees to my financial adviser's Licensee where there is a valid Advice fee request and 'Agreement for payment of Advice fee(s) and to receive Recipient Created Tax Invoice(s) (RCTI)' form in place between legalsuper and my financial adviser's Licensee.
- I understand that if my financial adviser's Licensee does not provide legalsuper a valid 'Agreement for payment of Advice fee(s) and to receive Recipient Created Tax Invoice(s) (RCTI)' form within six months of the first Advice fee deduction from my legalsuper account(s), under this Advice fee request, the deducted Advice fees will be refunded to me.

Member Signature*

Date (dd/mm/yyyy)*

6. Adviser declaration

- I acknowledge that legalsuper may request to view and audit the advice file(s) upon request.
- Neither I, nor my Licensee, will issue a tax invoice to the member in respect to the Advice fee(s) detailed on this form.
- I confirm the Advice fees are **solely** to pay for Advice services related to the member's interest in the legalsuper superannuation fund.
- I have read and agree to the Adviser Online Registration Terms and Conditions available at legalsuper.com.au/adviser-online-terms
- I acknowledge and accept that legalsuper reserves the right to decline payment of this Advice fee(s) request at any time.
- I understand that the legalsuper member can discontinue the Advice fee(s) arrangement at any time.
- I acknowledge that legalsuper can only pay Advice fees to my Licensee where there is a valid 'Agreement for payment of Advice fee(s) and to receive Recipient Created Tax Invoice(s) (RCTI)' form in place between legalsuper and my Licensee.
- I acknowledge and accept that if my Licensee does not provide legalsuper a valid 'Agreement for payment of Advice fee(s) and to receive Recipient Created Tax Invoice(s) (RCTI)' form within six months of the first Advice fee deduction from a legalsuper member's account, under this Advice fee request, the deducted Advice fees will be refunded to the legalsuper member.

Adviser signature*

Date (dd/mm/yyyy)*

We are committed to respecting the privacy of personal information you give us. If you would like a copy of legalsuper's Privacy Policy, visit legalsuper.com.au/privacy or call **1800 060 312**.

Important information – certified ID required

You will need to submit one or two forms of acceptable proof of identity with this *Advice fee request* form. You must provide certified copies of your original documents.

legalsuper will accept

ONE OF THE FOLLOWING DOCUMENTS ONLY:

- a. driver's licence issued under State or Territory law; or
- b. passport.

OR ONE OF THE FOLLOWING:

- a. birth certificate or birth extract; or
- b. citizenship certificate issued by the Commonwealth; or
- c. pension card issued by Centrelink that entitles the person to financial benefits;

AND ONE OF THE FOLLOWING:

- d. letter from Centrelink regarding a Government assistance payment; or
- e. notice issued by Commonwealth, State or Territory Government or local council within the past twelve months that contains your name and residential address; or
- f. a bank statement or utility notice with your current mailing address.

A certified document means a document that has been certified as a 'true copy' of an original document by one of the following:

- Barrister or solicitor
- Branch manager of a bank
- Councillor of a municipality
- Financial planner
- Justice of the Peace
- Medical, dental or veterinary practitioner
- Minister of religion
- Pharmacist
- Police officer
- Qualified accountant
- Teacher

The certification should be dated and include the full name, address and type of profession (from the above list) of the person certifying.

Although they may be qualifying members of the legal profession, members (as well as their family members) cannot certify their own ID.