

# Give access to your account details



Please complete in pen using CAPITAL letters and print  to mark boxes. Form must be completed in full. Read the Privacy Collection Statement on this form to see how AustralianSuper uses your personal information. Complete this form to provide a financial adviser with access to the details of your AustralianSuper account.

## STEP 1 – PROVIDE YOUR PERSONAL DETAILS

Last name		Mr	Ms	Mrs	Miss	Dr
<input type="text"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
First name						
<input type="text"/>						
Street address						
<input type="text"/>						
Suburb				State		Postcode
<input type="text"/>				<input type="text"/>		<input type="text"/>
Telephone (business hours)		Telephone (after hours)		Mobile		
<input type="text"/>		<input type="text"/>		<input type="text"/>		
Email address						
<input type="text"/>						
Date of birth			Male		Female	
<input type="text"/>			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Your member number			<input type="text"/>			

## STEP 2 – PROVIDE DETAILS OF YOUR FINANCIAL ADVISER

If a financial adviser already has access to your account details and you provide details of a new adviser here, your current financial adviser will be replaced by the adviser named below.

Name of financial adviser						
<input type="text"/>						
Name of business						
<input type="text"/>						
Telephone						
<input type="text"/>						

## STEP 3 – SIGN THIS FORM

By signing this declaration you request and consent to give a financial adviser (Adviser) access to your account details and understand that:

- once access is granted, your financial adviser and/or their staff will be able to obtain relevant information and to monitor your account on your behalf. Only you will be able to make changes to your account, and
- you may withdraw a financial adviser's access at any time by calling us or sending us a written notice. The withdrawal or change will take effect by the fifth business day after the day on which we receive your phone call or written notice.

I have read the Privacy Collection Statement and I understand how AustralianSuper will use my personal information.

Sign here:



Date

Please return this completed form to us:  
GPO Box 1901, MELBOURNE VIC 3001  
Questions? Telephone 1300 300 273

FINANCIAL ADVISER USE ONLY  
Reference or invoice number

## Privacy Collection Statement

Please read this Privacy Collection Statement to see how AustralianSuper uses your personal information.

The information collected on this form, and all other information provided by you at the request of AustralianSuper, the Fund administrator (Superpartners Pty Ltd) or the Fund's insurers, will be used by AustralianSuper and its staff to:

- open and administer your super account, and keep you informed about your super and insurance
- ensure you're eligible for products and services (including insurance)
- help you combine your super accounts and check if you have lost super (when you ask us to)
- undertake market research, member data analysis and direct marketing activities.

If AustralianSuper can't collect this information from you it will be difficult to perform the activities listed above.

Personal information is generally collected directly from you or through your employer, adviser, previous superannuation fund, or other representative authorised by you.

Health information is collected from you or your employer, adviser, other insurer, or other representative authorised by you and is provided to us or to our insurers. If required, we obtain independent medical reports directly from your medical practitioner(s). AustralianSuper will share your personal information with these service providers:

- Superpartners Pty Ltd to open and administer your account and report required information to the Australian Taxation Office for tax related purposes. Superpartners Pty Ltd may also collect personal information on our behalf directly from you (for example, if you call our contact centre or send us queries, or if further information is required from you to open and administer your account)
- the insurers so they can assess your eligibility for insurance and look after any insurance claims
- online service providers where you consent to provide your identification details for an online identification check
- mail houses to send you information about your account via mail, SMS and email
- independent consultants and market research companies to conduct member data analysis and run member research via phone, mail, SMS or email
- auditors and lawyers for accounting, auditing and legal requirements.

These service providers and third parties may be given access to your personal information:

- our web hosting companies to host and manage our websites
- our web and application developers to develop applications, enhance our websites and to test that our applications and websites are working properly
- our Member Direct partner to host and manage our Member Direct platform if you invest in the Member Direct investment option
- our online calculator providers if you provide personal information when using our online calculators

- mail houses to send you direct marketing material
- third parties that have requested information under the Family Law Act about a member's account
- Government bodies, regulatory authorities and law enforcement bodies as required under applicable laws and regulations
- other superannuation, pension and investment fund trustees or administrators if you transfer your investment to another fund
- if you die while you are an AustralianSuper member, AustralianSuper may share details about your super and insurance with your dependants, legal personal representative or power of attorney as appropriate. The information we share may include the names of your nominated beneficiaries, your account balance and any insurance amount payable.

Instances where your personal information may be accessed by an overseas service provider are:

- to deliver some emails – only required details will be shared with service providers. These services are provided by Sitecore Australia Pty Ltd out of the USA and also an AustralianSuper contractor out of Sweden
- to administer the Member Direct investment option. These services are provided on behalf of UBS Securities Australia Limited (UBS) out of New Zealand
- where you request financial planning advice from Mercer Financial Advice (Australia) Pty Ltd – data entry in financial planning software, reports and first draft Statements of Advice are provided by Mercer's related entity on behalf of Mercer out of India.

Superpartners Pty Ltd may use overseas service providers located in countries including the USA, India, Singapore, Canada, Malaysia, New Zealand and the UK for aspects of fund administration (a current list of countries can be found in Superpartners' privacy policy at [www.superpartners.com.au](http://www.superpartners.com.au)). Your personal information may be accessed by those service providers.

We recommend that you provide any nominated beneficiaries listed on this form with a copy of AustralianSuper's Privacy Collection Statement and tell them that you have provided AustralianSuper with their name and address details. These details will only be used to manage payment of your super in the event of your death.

AustralianSuper's Privacy Policy provides you with information about how you may:

- access your personal information held by AustralianSuper and change that information
- complain about a breach of the Privacy Act 1988 (Cth) and how AustralianSuper will deal with such a complaint.

AustralianSuper's Privacy Collection Statement and Privacy Policy may change from time to time. The latest versions will be available online at [www.australiansuper.com/CollectionStatement](http://www.australiansuper.com/CollectionStatement) and [www.australiansuper.com/privacy](http://www.australiansuper.com/privacy)

Please return this completed form to us:

GPO Box 1901, MELBOURNE VIC 3001

Questions? Telephone 1300 300 273