



1. Download and complete the Australian Tax Office's downsizer contributions form at ato.gov.au/Forms/Downsizer-contribution-into-super-form
2. Contact us at **1300 300 273** 8am to 8pm AEST/AEDT weekdays to tell us you intend to submit this form, so we can give you payment details first.
3. Once you've notified us, you can then submit your completed form to us via our website australiansuper.com/upload-document before or at the same time you make the downsizer contribution.

1 Work out if you can add extra to your super

☐ I'm under age 75

2 Tell us your details

[illegible][illegible][illegible]

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Mr Mrs Ms Miss Dr

Date of birth

D	D	M	M	Y	Y	Y	Y
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3 How would you like to contribute?

☐ Cheque

Please find attached my cheque (payable to AustralianSuper) for

\$. .

☐ Direct debit

Note: The maximum amount you're able to request is \$360,000. If you would like to contribute more, please submit another form for the additional amount.

By using direct debit, you can make regular contributions to your super automatically from any bank or financial institution in Australia. You can also set up a direct debit by logging into your account online at australiansuper.com. Submitting a new direct debit request at least five business days before the next scheduled debit will replace your existing arrangement.

How much?

How much?

How often?

[illegible]☐ Once-off² ☐ Twice monthly ☐ Monthly ☐ Quarterly

² Once-off direct debit requests will be processed within 5 business days of receipt.

3 How would you like to contribute? (continued)

Bank account details (Provide a personal bank account in your name, or a personal joint account that contains your name. Business bank accounts will not be accepted).

Name of bank/building society/credit union

[illegible]

Account name (this is the account holder's name)

[illegible]

Branch

[illegible]

BSB number

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Account number

[illegible]

Are you the sole account holder?

- ☐ Yes Sign below at Step 4.
- ☐ No If you hold the account jointly, the other account holder must also sign at Step 4.

I request and authorise AustralianSuper, the user (user ID number 116298) to arrange for the amount specified above to be debited or charged to me through the Bulk Electronic Clearing System from the account held at the financial institution specified above at the frequency nominated above, subject to the terms and conditions of the Direct Debit Service Agreement over the page.

4 Sign this form

I've read the Privacy Collection Statement as set out below, and I understand how AustralianSuper will use my personal information. To the best of my knowledge, the information I've provided on this form is correct.

I confirm that I'm under age 75 and that the information I've provided on this form is true and correct.

Sign here



Date _____

D	D	M	M	Y	Y	Y	Y
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Print full name

[illegible]

Signature of joint account holder for direct debit request

Date _____

D	D	M	M	Y	Y	Y	Y
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Print full name

[illegible]

Privacy Collection Statement

Please read this Privacy Collection Statement to see how AustralianSuper uses your personal information. AustralianSuper Pty Ltd (ABN 94 006 457 987) of GPO Box 1901, Melbourne, Victoria, 3001, collects your personal information (PI) to operate, and administer your super account (including insurance) or retirement income account, improve our products and services and keep you informed. If we can't collect your PI we may not be able to provide these services. PI is collected from you but sometimes from third parties like your employer and your financial adviser (if applicable). We will only share your PI where necessary to perform our activities with our administrator (Australian Administration Services Pty Ltd, being a part of MUFG Pension & Market Services Holdings Ltd), our contact centre provider (Concentrix Services Pty Ltd), service providers, as required by law or court/ tribunal order, or with your permission. Your PI may be accessed overseas by some of our service providers and, where applicable to your circumstances, by third-party service providers of your financial adviser. Our Privacy Policy details how to access and change your PI, as well as our privacy complaints process. For complete details go to australiansuper.com/privacy or call us on **1300 300 273**.

Direct Debit service agreement

1. About this Direct Debit Agreement

By submitting a Direct Debit Request, you authorise AustralianSuper Pty Ltd (we or us) to arrange, directly or by our agents, for funds to be debited from your nominated account. You should refer to the Direct Debit Request and this Agreement for the terms of the arrangement between us and you.

Direct debiting is not available on all accounts (for example, business bank accounts will not be accepted – please provide a personal bank account in your name, or a personal joint account that contains your name) and you should confirm with your financial institution that your nominated account can accept direct debit. You should also confirm the account details which you have provided to us are correct by checking them against a recent account statement and if you're uncertain, please contact your financial institution.

2. If AustralianSuper wants to change this agreement

We'll advise you at least 14 days in advance of any changes to an ongoing arrangement between you and us.

3. If you want to change or cancel your direct debit arrangements

You can change your ongoing arrangement by submitting a new direct debit request at least five business days in advance of the next scheduled direct debit. This will replace your existing arrangement.

If you wish to change your banking details, we'll need to receive your request at least five business days before the date we debit your bank account.

If you currently have a direct debit arrangement, it will be canceled and replaced when you complete and return a new *Add to your super with after-tax contributions* form, either by mail or email. If this is a once-off direct debit request, it may be processed in addition to the existing ongoing direct debit arrangement.

If you want to cancel your direct debit, you need to advise us at least five business days before the date we debit your bank account. You can advise us in writing, via email or by calling us on **1300 300 273** between 8am and 8pm AEST/AEDT (Melbourne time) Monday to Friday. Alternatively, you may also contact your financial institution to cancel your direct debit.

4. Direct debit due dates

Once-off direct debits: Once-off direct debits are set up to be debited on the first business day after we've processed your direct debit request.

Recurring direct debits: Recurring direct debits will be debited on the next available scheduled direct debit date, after we've processed your request. Once established, recurring direct debits fall on the following dates:

- Twice monthly direct debits occur on the 7th and 21st of each month,
- Monthly direct debits occur on the 28th of each month, and
- Quarterly direct debits will occur on the 28th of the month ending each business quarter (July, October, January and April).

We'll generally process your direct debit request within 3-5 business days from the date of receipt.

Where a direct debit falls on a weekend or Australian Public Holiday, then the direct debit will be processed the following business day.

5. Make sure you have enough money in your bank account

It is your responsibility to ensure sufficient cleared funds are available in your nominated account. We don't take any responsibility for fees or charges incurred on your account as a result of overdrawn funds or any other charges incurred as a result of Direct Debit arrangements.

If there isn't enough money (cleared funds) in your account, we'll still make the debit. But if your bank dishonours the debit, we may pass onto you, any dishonour fees or costs incurred by the Fund. This will be in addition to any dishonour fees charged by your bank.

If your financial institution declines our debit request, we'll write to you to let you know. We won't attempt the same deduction again, but if two consecutive deductions are declined, we'll cancel your ongoing arrangement.

6. Confidentiality

We'll keep your bank account details confidential except when a court order applies, AustralianSuper's bank needs information about your account, or you give us permission to reveal your bank details.

7. Ensure you give us your correct details

Before setting up your direct debit, please check that:

- your banking institution accepts direct debits
- the account provided is a personal bank account in your name, or a personal joint account that contains your name (business bank accounts will not be accepted), and
- the account number and BSB you give us is correct (refer to your bank statement or contact your bank if necessary).

8. Check your bank statements

Make sure the right amount has been deducted from your account. If there's a dispute regarding a debit made from your bank account, we'll respond to your dispute within five business days.

You can check if your direct debit has gone through by logging into your online account or the mobile app to view your transactions. It's your responsibility to check your account statement to make sure the amounts debited from your account are correct. We recommend you regularly check your transactions to make sure everything is okay.

9. Dispute resolution

You should contact us on **1300 300 273** if you have a query or complaint regarding the amount or timing of our drawings on your account. You may also direct any queries or complaints to your financial institution.

If we conclude as a result of our investigations that your account has been incorrectly debited, we'll respond to your query by arranging for your financial institution to adjust your account (including interest and charges) accordingly. We'll also notify you in writing of the amount by which your account has been adjusted.

If we conclude as a result of our investigations that your account has not been incorrectly debited, we'll respond to your query by providing you with reasons and any evidence for this finding in writing.

10. Privacy

Our Privacy Policy will apply to your records and account details. Our Privacy Policy is available at australiansuper.com/privacy or by calling **1300 300 273**. We may need to give information about you to your financial institution if you claim that your account has been incorrectly or wrongly debited.

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