

Bendigo SmartOptions

Family Fee Aggregation Application Form



This form should be used if you wish to link multiple Bendigo SmartOptions accounts (including those of family members) for the purpose of calculating the Administration Fee payable.

This form can be used for the following products:

- Bendigo SmartOptions Super™
- Bendigo SmartOptions Pension™

Please complete this form in **black** or **blue** ink using **CAPITAL LETTERS** and where provided, mark answer boxes with an X.

Conditions apply:

- Each member applying to link accounts, for the purpose of fee aggregation, must be a member of the same immediate family (husband, wife, son, daughter, step son, step daughter, de facto, partner, father, mother, brother or sister), and have the same financial adviser.
- A fee aggregation nomination can be rejected and linking can be cancelled at any time by Sandhurst at our discretion.
- Any new fee aggregation nomination will either need to be signed by all linked members or requested by your financial adviser
- Any new fee aggregation nomination will override any previous nomination.
- Where you change or remove your financial adviser, linking of your account for the purpose of calculating the Administration Fee will be cancelled.
- A maximum of four accounts are allowed to be linked.

Please ensure that each linked member, (including yourself) completes and signs this form, and that each member has read and understood the terms and conditions of this form and the information in the current Bendigo SmartOptions Super and/or Bendigo SmartOptions Pension product disclosure statement (PDS).

Linked member 1

Member number (if known)

Title Gender Female Male

Surname

Given name(s)

Date of birth / /

Relationship to group (such as husband, wife, etc)

Declaration:

I have read the current Bendigo SmartOptions Super and/or Bendigo SmartOptions Pension PDS, and acknowledge that this application is subject to the terms and conditions of fee aggregation outlined in the PDS.

I have read and understood Bendigo and Adelaide Bank Group's Privacy Policy which is available at www.sandhursttrustees.com.au and agree that Sandhurst and Bendigo and Adelaide Bank Group may collect, use and disclose my personal information in accordance with the Privacy Policy.

I am applying for my account(s) to be linked to other parties detailed on this form for the purpose of calculating the Administration Fee, and warrant that the information I have disclosed in this form is true and correct.

Signature Date / /

Linked member 2

Member number (if known)

Title Gender Female Male

Surname

Given name(s)

Date of birth / /

Relationship to group (such as husband, wife, etc)

Declaration:

I have read the current Bendigo SmartOptions Super and/or Bendigo SmartOptions Pension PDS, and acknowledge that this application is subject to the terms and conditions of fee aggregation outlined in the PDS.

I have read and understood Bendigo and Adelaide Bank Group's Privacy Policy which is available at www.sandhursttrustees.com.au and agree that Sandhurst and Bendigo and Adelaide Bank Group may collect, use and disclose my personal information in accordance with the Privacy Policy.

I am applying for my account(s) to be linked to other parties detailed on this form for the purpose of calculating the Administration Fee, and warrant that the information I have disclosed in this form is true and correct.

Signature

Date / /

Linked member 3

Member number (if known)

Title Gender Female Male

Surname

Given name(s)

Date of birth / /

Relationship to group (such as husband, wife, etc)

Declaration:

I have read the current Bendigo SmartOptions Super and/or Bendigo SmartOptions Pension PDS, and acknowledge that this application is subject to the terms and conditions of fee aggregation outlined in the PDS.

I have read and understood Bendigo and Adelaide Bank Group's Privacy Policy which is available at www.sandhursttrustees.com.au and agree that Sandhurst and Bendigo and Adelaide Bank Group may collect, use and disclose my personal information in accordance with the Privacy Policy.

I am applying for my account(s) to be linked to other parties detailed on this form for the purpose of calculating the Administration Fee, and warrant that the information I have disclosed in this form is true and correct.

Signature

Date / /

Linked member 4

Member number (if known)

Title Gender Female Male

Surname

Given name(s)

Date of birth / /

Relationship to group (such as husband, wife, etc)

Declaration:

I have read the current Bendigo SmartOptions Super and/or Bendigo SmartOptions Pension PDS, and acknowledge that this application is subject to the terms and conditions of fee aggregation outlined in the PDS.

I have read and understood Bendigo and Adelaide Bank Group’s Privacy Policy which is available at www.sandhursttrustees.com.au and agree that Sandhurst and Bendigo and Adelaide Bank Group may collect, use and disclose my personal information in accordance with the Privacy Policy.

I am applying for my account(s) to be linked to other parties detailed on this form for the purpose of calculating the Administration Fee, and warrant that the information I have disclosed in this form is true and correct.

Signature

Date / /

Contact details:

Sandhurst Trustees Limited
 Bendigo SmartOptions
 GPO Box 529
 Hobart Tasmania 7001
 Phone: 1800 033 426
 Fax: 03 6215 5800
 Email: superannuation@bendigobank.com.au
 Website: www.sandhursttrustees.com.au/SmartOptions