

Additional contribution form

Please use this form if you would like to make an additional contribution to your super account by cheque or direct debit. If you would like to set up a regular contribution by direct debit please use the 'Regular Contribution By Direct Debit Form'.

Fields marked with an asterisk (*) must be completed in order for us to action your request.



Did you know you can also make contributions using BPay. Your Biller Codes and Customer Reference Numbers are available online, from your adviser or by contacting our Service Centre on **132 977**.

A. Member details

*My account number / (e.g. CSUP / 100000)

*Given name(s)

*Surname

*Date of birth

B. Contribution method

Direct debit OR Cheque Please ensure all cheques are payable to '**ClearView Wealth**'

For ad-hoc direct debits please nominate the date of payment (allow at least 6 business days)

Next available OR Nominated date

1. Details of contribution

Note: If you have nominated an amount under 'Personal concessional' you will need to provide us with a tax deduction (Section 290-170) notice. We will contact you at the end of the financial year regarding this.

Personal concessional \$.

Personal non-concessional \$.

Spouse contribution \$.

Other contribution (please provide details e.g. Downsizer contribution, personal injury payment, SMSF Rollover)

\$.

Total \$.

2. Investment instructions for this contribution

Use my Money In Choice OR

Investment Pool \$. + \$. = \$. Total contribution

C. Nominated bank account (direct debit only)

Name of Australian financial institution

Name of account

BSB number

-

Account number

D. Authorisation and signature(s)

By signing this form:

- I declare that all the details given in this form are true and correct;
- I request and authorise ClearView Life Assurance Limited (User ID number 475016 for WealthFoundations Super or User ID 022829 for ClearView Superannuation & Roll-overs) (**ClearView Life**) to debit my nominated account in accordance with the arrangement made between us as set out in this form;
- I acknowledge that this debit will be made through the Bulk Electronic Clearing System (BECS) from my account held at the financial institution I have nominated in this form and will be subject to the terms and conditions of the Direct Debit Request Service Agreement (**Agreement**). For further information see pages 3 and 4 of this form;
- I understand and agree to the terms and conditions governing the debit arrangement between myself and ClearView Life as set out in this form and in the Agreement;
- I understand that if the direct debit is dishonoured, a fee will be charged and a processing fee may be charged by my financial institution;
- I understand that all bank account signatories must sign below; and
- I understand that the personal information provided will be collected, used and disclosed in accordance with the relevant Product Disclosure Statement and Information Handling Policy.

Signature of person making contribution
(bank account signatory if direct debit)

Date

Full name **PRINT CLEARLY IN BLOCK LETTERS**

Bank account signatory (if second signatory required)

Date

Full name **PRINT CLEARLY IN BLOCK LETTERS**

Direct debit request service agreement

By signing a direct debit request, you have authorised us to arrange for funds to be debited from your bank account for contributions into your ClearView WealthFoundations or ClearView Superannuation and Roll-overs account. You should refer to the direct debit request and this Direct Debit Request Service Agreement set out below for the terms of the arrangement between us and you.

The following is your Direct Debit Request Service Agreement with us. The agreement is designed to explain what your obligations are when undertaking a Direct Debit arrangement with us. It also details our obligations to you.

Definitions

account means the account held at your financial institution from which we are authorised to arrange for funds to be debited.

agreement means this Direct Debit Request Service Agreement between you and us.

business day means a day other than a Saturday or a Sunday or a public holiday listed throughout Australia.

debit day means the day that payment by you to us is due.

debit payment means a particular transaction where a debit is made.

direct debit request means the direct debit request between us and you.

us or we or our means ClearView Life Assurance Limited ABN 12 000 021 581 (the administrator of the ClearView Retirement Plan (Plan) and acting on behalf of ClearView Life Nominees Pty Limited the Trustee of the Plan), the debit user you have authorised by signing a direct debit request.

you means the customer who signed the direct debit request.

your financial institution is the financial institution where you hold the account that you have authorised us to arrange to debit.

1. Debiting your account

1.1 By signing a direct debit request, you have authorised us to arrange for funds to be debited from your account. You should refer to the direct debit request and this agreement for the terms of the arrangement between us and you.

1.2 We will only arrange for funds to be debited from your account as authorised in the direct debit request.

1.3 If the debit day falls on a day that is not a business day, we may direct your financial institution to debit your account on the following business day. If you are unsure about which day your account has or will be debited, you should ask your financial institution.

2. Changes by us

2.1 We may vary any details of this agreement or a direct debit request at any time by giving you at least fourteen (14) days written notice.

3. Changes by you

3.1 Subject to 3.2 and 3.3, you may change the arrangements under a direct debit request by contacting us on 132 977.

3.2 If you wish to stop or defer a debit payment you must notify us in writing at least seven (7) business days before the next debit day. This notice should be given to us and/or arrange it through your financial institution.

3.3 You may also cancel your authority for us to debit your account at any time by giving us fourteen (14) business days' notice in writing before the next debit day. This notice should be given to us and/or arrange it through your financial institution.

4. Your obligations

4.1 It is your responsibility to ensure that there are sufficient clear funds available in your account to allow a debit payment to be made in accordance with the direct debit request.

4.2 If there are insufficient clear funds in your account to meet a debit payment:

- a. you may be charged a fee and/or interest by your financial institution;
- b. you may also incur fees or charges imposed or incurred by us; and
- c. you must arrange for the debit payment to be made by another method or arrange for sufficient clear funds to be in your account by an agreed time so that we can process the debit payment.

4.3 You should check your account statement to verify that the amounts debited from your account are correct.

4.4 If ClearView Life Assurance Limited is liable to pay goods and services tax (GST) on a supply made in connection with this agreement, then you agree to pay ClearView Life Assurance Limited on demand an amount equal to the consideration payable for the supply multiplied by the prevailing GST rate.

5. Dispute

5.1 If you believe that there has been an error in debiting your account, you should notify us on **132 977** and confirm that notice in writing with us as soon as possible so that we can resolve your query.

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

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

5.4 You agree to direct any queries you may have about an error made in debiting your account to us so that we can attempt to resolve the matter between us and you. You may wish to refer the matter to your financial institution if we cannot resolve the matter or in the first instance, who will obtain details from you of the disputed transaction and may lodge a claim on your behalf.

6. Accounts

You should check:

- a. with your financial institution whether direct debiting is available from your account as direct debiting is not available on all accounts offered by financial institutions;
- b. your account details which you have provided to us are correct by checking them against a recent account statement; and
- c. with your financial institution before completing the direct debit request if you have any queries about how to complete the direct debit request.

7. Confidentiality

7.1 We will keep any information (including your account details) in your direct debit request confidential. We will make reasonable efforts to keep any such information that we have about you secure and to ensure that any of our employees or agents who have access to information about you do not make any unauthorised use, modification, reproduction or disclosure of that information.

7.2 We will only disclose information that we have about you:

- a. to the extent specifically required by law; or
- b. for the purposes of this agreement (including disclosing information in connection with any query or claim).

8. Notice

8.1 If you wish to notify us in writing about anything relating to this agreement, you should write to:

ClearView Wealth
Reply Paid 4232
Sydney NSW 2001

8.2 We will notify you by sending a notice in the ordinary post to the address you have given us in the direct debit request.

8.3 Any notice will be deemed to have been received two business days after it is posted.

Sending your form

Please send the form to us via email or mail.

Mailing address:
ClearView Wealth
Reply Paid 4232
Sydney NSW 2001

Email address:
client.wealth@clearview.com.au

If you have any questions or need help please call our Service Centre on **132 977**.