

Once completed, return to:
 TASPLAN
 GPO Box 1547
 Hobart TAS 7001
 Freecall 1800 005 166

Section 1: Your personal details

Mr Mrs Ms Miss Dr Other <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Last name	
First name	Date of birth D D M M Y Y Y Y	
Middle name/s	Male <input checked="" type="checkbox"/> Female <input checked="" type="checkbox"/>	
Residential address		
Suburb/Town/City	State	Postcode
Postal address		
Suburb/Town/City	State	Postcode
Home phone	Mobile	
Work phone		
Primary email		
Secondary email		
Tax file number (TFN)		

Under the *Superannuation Industry (Supervision) Act 1993*, you're not obliged to provide your TFN. If you don't provide your TFN, you may pay more tax than you need to. Also, you won't be able to make personal contributions, or be eligible for government contributions. Providing your TFN also makes it easier for you to keep track of your super. Refer to the *How super is taxed* fact sheet for more information.

Section 2: Choose your investment option or options

You can choose to invest in one or a combination of different investment options. Just make sure the percentages are whole numbers (i.e. not 30.5%), and they add up to 100%.

If you don't make a choice, you'll be invested in the Tasplan OnTrack* investment option.

You can switch your investment options via Tasplan Online, or by completing a *Change your investments* form available on our website at www.tasplan.com.au/forms or call us on 1800 005 166, and we'll mail you a paper copy. Refer to the *Investment guide* for more information.

Any funds rolled into Tasplan will be invested in your chosen investment options unless you tell us otherwise.

*Your date of birth determines which Tasplan OnTrack stage you're invested in. So, it's important that we have this recorded correctly.

Investment option	Percentage to be invested
Growth	%
Sustainable	%
Balanced	%
Moderate	%
Conservative	%
Australian shares	%
International shares	%
Property	%
Fixed interest	%
Cash	%
Tasplan OnTrack*	%

Total 100%

Section 3: Choose your preferred beneficiaries

Nominate your preferred beneficiaries for payment of benefits in the event of your death. To nominate additional beneficiaries, provide the details on a separate sheet, which must be signed and dated by you. To make a binding death benefit nomination, complete the *Make a binding death benefit nomination* form available on our website at www.tasplan.com.au/forms or call us on **1800 005 166**, and we'll mail you a paper copy. Refer to the *How super works* fact sheet for more information.

	Full name	Date of birth	Relationship (e.g. wife, son)	% of benefit
1.				%
2.				%
3.				%
4.				%
5.				%

Total 100%

Section 4: Select your insurance in Tasplan Protect 1

If you provide details in Section 5 of the employer who'll be making super contributions for you, you may automatically receive basic cover provided you meet eligibility criteria. If you don't have an employer making super contributions for you, but you'd like insurance, you need to complete an application form available on our website at www.tasplan.com.au/forms or call us on **1800 005 166**, and we'll mail you a paper copy. Refer to the *Tasplan Super Insurance guide Tasplan Protect 1* for more information.

Insurance claims and disability payments

If you currently have an insurance claim under review, or if you've previously received a disability payment from another insurer or super fund, you'll be provided with death only cover.

Do you have a claim under review? Yes No

Have you received any prior disability insurance payments? Yes No

Occupation rating

The type of work you do will determine your occupation rating. Place an X in the box below that best describes your current occupation. If you don't choose a box, your occupation rating will be general. If your job changes in the future, you need to let us know as it may affect your occupation rating.

The duties of your occupation are limited to professional, managerial, administrative, clerical, secretarial or similar 'white collar' tasks which don't involve manual work, and are undertaken entirely within an office environment. If this applies, you qualify for white collar.

You qualify for white collar, earn over \$80,000 each year from your profession and have either:

- tertiary qualifications
- membership of a professional institute or are registered by a government body
- a senior managerial role.

If this applies, you qualify for professional.

None of the above. If so, you qualify for general.

Fixed and additional cover

I want to apply for fixed cover up to my age-based limit and have attached my *Short form underwriting - Tasplan Protect 1* form.

If you're eligible to receive basic cover, you may apply for fixed cover up to your age-based limits. The form is available on our website at www.tasplan.com.au/forms or call us on **1800 005 166**, and we'll mail you a paper copy. If approved by the insurer, fixed cover will be provided in addition to your basic cover. We'll let you know in writing once your application has been assessed.

I want to apply for additional death only or death and TPD cover above my age-based limit, or income protection cover and have attached my *Apply for insurance - Tasplan Protect 1* form.

The form is available on our website at www.tasplan.com.au/forms or call us on **1800 005 166**, and we'll mail you a paper copy. You need to provide detailed health information. We'll let you know in writing once your application has been assessed.

Opt out of cover

I don't want any cover.

You can apply for insurance at any time if you change your mind, but you'll have to provide detailed health information and you won't be eligible for basic cover.

If you opt out of cover before turning age 25, your basic cover will be automatically reinstated on your 25th birthday for the amount applicable. If you don't need this cover at the time of reinstatement, you need to let us know.

To reduce your basic cover without opting out completely, complete the *Cancellation or reduction of insurance - Tasplan Protect 1* form available on our website at www.tasplan.com.au/forms or call us on **1800 005 166**, and we'll mail you a paper copy.

Insurance transfer

I want to transfer my existing insurance to Tasplan.

To transfer your existing cover with another super fund to Tasplan, complete the *Transfer your insurance to Tasplan - Tasplan Protect 1* form before you combine your other super with Tasplan. The form is available on our website at www.tasplan.com.au/forms or call us on **1800 005 166**, and we'll mail you a paper copy.

Section 5: Your employment details

We need this information so we can provide you with basic cover. Refer to the *Tasplan Super Insurance guide Tasplan Protect 1* for more information.

Employer's trading name

Tasplan employer code (if known)

Employer's ABN

Contact phone

Contact name

Contact position

Contact email

Your occupation

Date you joined your employer

Section 6: Combine your super

Do you have super with another fund?

Yes No

Would you like to combine it with your Tasplan account?

Yes No

If yes, complete the *Combine your super with Tasplan - Tasplan Protect 1* form and mail it to us. If you have more than one fund to combine, you can photocopy the form. We'll contact the super fund on your behalf. You can also combine your super via Tasplan Online.

Section 7: How we communicate with you

You can choose how you'd like to receive certain communications from us by placing an X in the relevant boxes below. Make sure your email address is provided in Section 1 if you'd like to receive these communications electronically.

Tasplan is legally required to send you information about material changes and significant events regarding our products. If you don't select an option and we have your email address, we'll email you these communications. If you don't select an option and we don't have your email address, we'll mail you these communications.

Statements and disclosures:

Email

Mail

We'll also send you other information about member services or benefits. You can decline to receive it, though you could miss out on important information to help you make the most of your super.

Newsletter emails:

Yes

No

Marketing emails:

Yes

No

Section 8: Member declaration

I apply to become a member of Tasplan Super and I acknowledge that:

- I'll be bound by the policies, procedures, trust deed and rules that govern Tasplan and the relevant law.
- If I'm eligible for payment and I don't give instructions, the trustee may keep my benefit in accordance with my current instructions.
- Tasplan Online is a facility to confirm receipt of my contributions and to view my transactions.
- I've read the *privacy policy* and *privacy collection statement* available on the Tasplan website at www.tasplan.com.au/privacy-policy and understand how my personal information will be used.
- I've received, read and understood the *Tasplan Super Member guide Tasplan Protect 1* dated 1 April 2017, including any reference material, and agree to be bound by it.
- The trustee has advised me to obtain personal financial advice and I've received all the information I need to understand the choices I've made.
- I've disclosed all material information and the above information provided by me is true and correct.

Your signature



Date

You MUST sign and date the member declaration above for this request to be valid.

Privacy collection statement

Tasplan's *privacy collection statement* tells you how we collect your information, what we use it for and who we share it with. Our *privacy collection statement* and *privacy policy* may change from time to time. The latest versions are available on our website at www.tasplan.com.au/privacy-collection-statement and www.tasplan.com.au/privacy-policy