

Direct Debit Form

Use this form if you want to make, change or cancel to pay your max Super contributions via a direct debit. Please provide the details of the member who will receive the direct debit contribution in Step 1. For more information on types of contributions, see the PDS and Reference Guide.

Please use a **dark pen** and CAPITAL letters (except for your email address), print it and send it to us. Use **(X)** to mark boxes. Forms are located on our website at maxsuper.com.au/member/forms-docs. If you have any questions, call us on 1300 629 787.

What would you like to do?

<input type="checkbox"/>	Make monthly personal contributions	1, 2, 3 and 6
<input type="checkbox"/>	Change the account from which the direct debit is deducted	1, 3 and 6
<input type="checkbox"/>	Change the monthly payment amount	1, 2 and 6
<input type="checkbox"/>	Cancel the direct debit arrangement	1, 4 and 6

Complete sections:

Step 1: Personal details of member receiving the contribution

Member number

Date of birth

 - -

Title

Last name

Given name(s)

Address

Suburb

State

Postcode

Daytime contact number

Mobile number

M F

Tax file number (if not previously provided)

Email

Step 2: Contribution type and amount

We must hold the tax file number of the member receiving the contribution before we can accept personal after-tax or spouse contributions. There are also conditions that apply to each contribution type, including age limits, contribution caps and work test rules. See Notes Section for details.

Contribution type

Please mark **X** in the relevant box below

Personal after-tax contribution (under 65)
By ticking this box, you acknowledge that you are less than age 65.

Personal after-tax contribution (65 and over)
By ticking this box, you acknowledge that you are age 65 or older (but not age 75 or above) and you have met the work test for the financial year in which you are making the contribution.

Monthly amount

\$, .

\$, .

Step 3: Financial institution account details

This is a request and authority to debit the account named below to pay max Super. I request that you debit the following account of which I am an authorised signatory:

Financial institution

Month from which the debits should start

Address

Suburb

State

Postcode

Bank account name

BSB no.

Bank account no.

IMPORTANT: If your account is held jointly, please provide both names. This debit will be subject to the terms and conditions of the Direct Debit Service Agreement at Step 7.

Step 4: Cancel or change your direct debit

Select your option

I would like to:

Cancel the current monthly direct debit arrangement held with the following financial institution:

OR

Change the current monthly direct debit arrangement for this account:

Bank account name

BSB no.

Bank account no.

New amount to be deducted:

\$, .

IMPORTANT: Only an authorised signatory of the bank account can cancel a direct debit. Please note that you must advise us of the cancellation at least 14 days before the debit is due to be processed.

Step 5: Privacy

The personal information you provide on this form is collected by and held for max Super by the fund administrator, DDH Graham Limited, in accordance with the Australian Privacy Principles of the Privacy Act 1988 (Cth), for the purpose of administering your account and providing you with services associated with your fund membership.

For further information about how your personal information is handled, please call us on 1300 629 787 or visit maxsuper.com.au/about/privacy-policy to view the privacy policy (a hard copy of the policy may also be provided on request). The policy contains information about how you may access and seek correction of your personal information, how you may complain about a breach of your privacy and other important information about how your personal information is collected, used and disclosed.

Step 6: Signature and declaration of bank account holder(s)

By signing this declaration, you acknowledge that you:

- understand and agree to the terms and conditions governing debit arrangements between you and max Super as set out in this form and the Direct Debit Service Agreement in Step 7;
- are an authorised signatory on the bank account nominated in Step 3 or if you are cancelling a direct debit, that you are an authorised signatory of the bank account which is being debited;
- have read and understand the max Super privacy policy.

Signature

Second account signatory (if required)

Date (DD-MM-YYYY)

Date (DD-MM-YYYY)

Step 7: Direct Debit Service Agreement

This is your Direct Debit Service Agreement with Tidswell Financial Services Ltd as trustee for max Super. It explains what your obligations are when undertaking a direct debit arrangement with us. It also explains our obligations to you as your direct debit provider. Please keep this agreement for future reference. It forms part of the terms and conditions of your Direct Debit Request (DDR) and should be read in conjunction with your request.

1. Debiting your account

1.1 By signing this Direct debit request form, 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 banking day, we may direct your financial institution to debit your account on the following banking day. If you are unsure about which day your account has or will be debited you should ask your financial institution.

2. Amendments by us

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. Amendments by you

You may change* a debit payment, or terminate (cancel) this agreement at any time by providing us with at least 14 days notification by writing to:

max Super,
PO Box 3528
Tingalpa DC QLD 4173

Email: maxteam@maxsuper.net.au

or by telephoning us on 1300 788 658 during business hours; or arranging it through your own financial institution, which is required to act promptly on your instructions.

* Note: in relation to the above reference to 'change', your financial institution may change your debit payment only to the extent of advising us of your new account details.

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

Step 7: Direct Debit Service Agreement cont'd

5. Disputes

5.1 If you believe there has been an error in debiting your account, you should notify us directly on 1300 788 658 and confirm that notice in writing with us as soon as possible so that we can resolve your query more quickly. Alternatively you can take it up directly with your financial institution

6. Accounts

You should check:

- a) your account details which you have provided to us are correct by checking them against a recent account statement; and
- b) 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:

max Super,
PO Box 3528
Tingalpa DC QLD 4173

Email: maxteam@maxsuper.net.au

We may send notices either electronically to your email address or by ordinary post to the address you have given us.

8.2 Any notice will be deemed to have been received on the third banking day after emailing or posting