

Voluntary (after-tax) Contribution

Please contact us if you have any questions about voluntary contributions at voluntarycontributions@mtaasuper.com.au

Please complete this form using CAPITAL LETTERS

Complete this form if you wish to make a contribution into your own account or your spouse's account.

To contribute via BPAY or EFT, login to Member SuperSite at mtaasuper.com.au/member-login

Before completing this form check your eligibility at Section B.

Section A

Personal details

Provide details of the person whose account you want this contribution paid to

MTAA Super member number (if known)

Given name/s

Family name

Date of birth

Mr

Mrs

Ms

Miss

Other

Street address

Suburb

State

Postcode

Telephone (business hours)

Mobile

Email

Please note: We cannot accept personal contributions unless we have a valid TFN recorded on the account. You can notify us of your tax file number either online at mtaasuper.com.au or by calling MTAA Super on **1300 362 415**.

Section B

Eligibility

To be eligible to make a contribution to **your own account**, MTAA Super must have your TFN and one of the following must be true:

- I am currently less than 65 years of age, or
- I am aged between 65 and 75, and have worked at least 40 hours in a consecutive period of 30 days during this financial year.

OR

To be eligible to make a contribution to **your spouse's account**, your spouse must have an MTAA Super account and valid TFN. If your spouse does not have a MTAA Super account, they can become a member at mtaasuper.com.au/join

The following statements must be true:

- My spouse and I are currently living together on a permanent basis
- My spouse is not employed by me
- My spouse is currently less than 65 years of age, or my spouse is aged between 65 and 70 and has worked at least 40 hours in a consecutive period of 30 days during this financial year.

Section C

One-off contributions

Please tick only one option

Contribution into my own account

Contribution into my spouse's account

Please deposit the enclosed cheque/money order payable to MTAA Super into the specified MTAA Super account.

\$

Print name

Member signature

Date

Section D

Regular contributions

To make regular future contributions please complete the 'Member direct debit application' below.

Member direct debit application

This section must be completed in full. Please select one of the following options:

Make a new application or

Make changes to existing direct debit arrangements.

I would like the first monthly debit amount to occur on or after:

Request and authority to debit the account named below to pay MTAA Super

Surname or company name

Given name or company ABN

Requests and authorises MTAA Super (ID number 116301) to arrange for my nominated amount to be debited through the Bulk Electronic Clearing System from an account held at the financial institution identified below, subject to the terms and conditions of the Direct Debit Application Service Agreement and any further instructions provided below.

The financial institution at which your account is held

Financial institution

Street address

Suburb

State

Postcode

Details of account to be debited

Name account is held in (for example: Fred Smith or ABC Pty Ltd)

BSB

Account number

Note that to be eligible to make ongoing voluntary contributions into MTAA Super, you must continue to satisfy any one of the conditions specified in Section B. If your circumstances change, and you no longer satisfy one of those conditions, it is important that you contact MTAA Super immediately. The trustee may refuse or refund voluntary contributions where required by law (including making adjustments to your account that it considers appropriate).

Section D

Regular contributions
(continued)

Acknowledgement

By signing this member direct debit application' section you acknowledge that:

- Having read and understood our Privacy Policy you agree to the collection and management of your personal information in line with this policy and the prevailing Privacy Laws. Protecting your personal information has always been important to us and is required by law. The Commonwealth Privacy Act requires us to handle your personal information in accordance with a set of guidelines, known as the Australian Privacy Principles. Please view our full Privacy Policy available at **mtaasuper.com.au/privacy** mtaasuper.com.au/privacy which sets out our full obligations regarding the handling of your personal information.
- You have read and understood the terms and conditions governing the debit arrangements between you and MTAA Super as set out in this application and in the 'Direct Debit Request – Service Agreement'.

amount to be deducted per month

Amount in words

Print name

Signature

Date

Direct Debit Request Service Agreement

This service agreement is a National Australia Bank requirement relating to the debiting of your bank account for superannuation contributions.

1.0 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 been or will be debited, you should ask your financial institution.

2.0 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.

3.0 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 **1300 362 415**.
- 3.2 If you wish to stop or defer a debit payment you must notify us in writing at least fourteen (14) days before the next debit day. This notice should be given to us in the first instance.
- 3.3 You may also cancel your authority for us to debit your account at any time by giving us fourteen (14) days' notice in writing before the next debit day. This notice should be given to us in the first instance.

4.0 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 you:
 - (a) might be charged a fee and/or interest by your financial institution
 - (b) might incur fees or charges imposed or incurred by us
 - (c) 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 National Australia Bank Limited (ABN 12 004 044 937) is liable to pay goods and services tax on a supply made by the National Bank in connection with this agreement, you agree to pay the National Bank on demand an amount equal to the consideration payable for the supply multiplied by the prevailing GST rate.

5.0 Dispute

- 5.1 If you believe there has been an error in debiting your account, you should notify us directly on **1300 362 415** and confirm with us that notification in writing as soon as possible, so that we can resolve your query quickly.
- 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 reasons and any evidence for this finding.

5.4 Any queries you might have about an error made in debiting your account should be directed to us in the first instance, so that we can try to resolve the matter between us and you. If we cannot resolve the matter you can still refer it to your financial institution, which will obtain from you details of the disputed transaction and might lodge a claim on your behalf.

6.0 Accounts

6.1 You should check:

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

7.0 Confidentiality

7.1 We will keep confidential any information (including your account details) in your direct debit request. We will make reasonable efforts to keep information 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 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).

8.0 Notice

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

MTAA Super
Locked Bag 5134
Parramatta NSW 2124

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.

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 your payment 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 (and includes any Form PD-C approved for use in the transitional period).

'Us' or 'we' means MTAA Super you have authorised by signing a direct debit request.

'You' or 'your' means the customer who signed the direct debit request.

'Your financial institution' is the financial institution where you hold the account you have authorised us to arrange to debit.

Email contact@mtaasuper.com.au

Postal address Locked Bag 5134, Parramatta NSW 2124

Trustee Motor Trades Association of Australia Superannuation Fund Pty. Limited
ABN 14 008 650 628 AFSL 238 718

Fund MTAA Superannuation Fund ABN 74 559 365 913

mtaasuper.com.au

1300 362 415