

INSTRUCTION TO REPLACE OR ADD BANK ACCOUNT FOR SUPERSMA ACCOUNTS



Complete this form to change or add the bank account linked to your SuperSMA account.

Issued by Diversa Trustees Limited ("Trustee") ABN 49 006 421 638 AFSL 235153, RSE Licence No L0000635 as trustee for Praemium SMA Superannuation Fund (SuperSMA) ABN 75 703 857 864 RSE Reg R1074352.

Please return a copy of this form via Adviser Portal upload or via email to support@praemium.com.au

A separate form is required for each account you wish to replace or add.

Part 1 - Change instructions

Member name

SuperSMA Account number

New bank account

Financial institution

BSB

Account name

Account number

This account is (select one):

to replace the bank account detailed in Part 2

to be added to my SuperSMA account

Note: direct debit/credit is not available on all bank accounts. If in doubt about please contact your financial institution.

Part 2 - Account to be removed (if applicable)

Important: If you remove a bank account, the usages attached to the account will be added to the new account (e.g. direct debit contributions, pension payments etc.).

Account to be removed

Financial institution

BSB

Account name

Account number

Part 3 - Declaration and signature(s)

I/We:

- Acknowledge these banking instructions may replace any instructions that I/we have previously provided to Praemium.

Where the bank account is used to direct debit contributions, I/We:

- Acknowledge that I/We have read and understood the direct debit request service agreement and agree with its terms and conditions, that I am eligible to make this contribution, and that all details in this form are true and correct.
- Request and authorise Praemium (user identification number 368281) to debit through the Bank Electronic Clearing System (BECS) the amount specified from the nominated account.
- Understand and acknowledge that Praemium may in its absolute discretion cancel the direct debit arrangement under the direct debit request service agreement.
- Acknowledge that personal contributions will be treated as non-concessional and to claim a tax deduction on member personal contributions, I must lodge a Notice of Intent to Claim form (ATO s.290-170) with Praemium by the earliest of: submitting my tax return for the income year in which the contributions were made; withdrawing or rolling over from the fund; commencing a pension; or before the end of the income year following the year in which the contributions were made.

Member signature

Date

Bank account owner 2 signature (if applicable)*

Date

Name of bank account owner 2

*Certified ID required for signatories other than the member.

Each signatory above confirms that they are an authorised signatory for the above account and that this form has been signed in the same way as the signing instructions held by the Financial Institution for the above account.

If signed under a Power of Attorney (POA) please enclose an originally certified copy of the Power of Attorney with your application form. The attorney certifies that he/she has not received notice of revocation of that power.