

Standard Choice Form - For New Joiners

(Applicable to Australia Region only)

All Fields denoted with * are mandatory

Select your choice of Superannuation (Super) Fund*

I request that all my future super contributions be paid to: (Please tick on the below Check box)

My Standard Super Fund

If you have Selected "My Standard Super Fund" (A super fund regulated by Australian Prudential Regulation Authority – APRA or Retirement Savings Account- RSA), complete Items 1, 2 and 4.

My Self-Managed Super Fund (SMSF)

If you have Selected "My Self-Managed Super Fund (SMSF)", please complete items 1, 3 & 4

1.0 Your Details

Full Legal Name*

Tax File Number(TFN) ⓘ

2.0 Nominating your Standard Super Fund:

(i.e. a super fund regulated by the Australian Prudential Regulation Authority or a Retirement Savings Account).

You will need current details from your superannuation fund to complete this item

Fund ABN*

Fund Name*

Fund Address

Suburb/Town

State/
Territory

Postal
Code

Fund Phone

Unique Superannuation
Identifier* (USI)

Account Name
(If Applicable)

Your Member Number
(if applicable)

2.1 Required Documentation

1. A 'Letter of Compliance' or statement of compliance from your super fund confirming that it is a complying superannuation fund. This document should include the super fund's Unique Superannuation Identifier (USI) and Australian Business Number (ABN). It should also confirm that the super fund will accept contributions from your employer and how contributions can be paid to it. This document is often found on the website of super funds;

and

2. A statement, welcome letter or other document from your super fund that displays your membership number.

3.0 Nominating your Self-Managed Super Fund (SMSF)

You will need current details from your superannuation fund to complete this item.

Superannuation Fund Name*:

Superannuation Fund ABN*:

Superannuation Fund Account Name*:

Superannuation Fund Bank BSB*:

Superannuation Fund Bank Account Number*:

Superannuation Fund Electronic Service Address
(ESA) Message Provider Name

Superannuation Fund ESA:

Superannuation Fund email address*:

*If you are the trustee, or a director of the corporate trustee you can confirm that your SMSF will accept contributions from ANZ by making the following declaration (place a tick in the box below): **

I am the trustee, or a director of the corporate trustee of the SMSF and I declare that the SMSF is complying and will accept contributions from ANZ

If you are not the trustee, or a director of the corporate trustee of the SMSF, please share a letter from the trustee confirming that the fund is complying and will accept contributions from ANZ.

3.1 Required Documentation

A recent Super Fund Look-Up screenshot from superfundlookup.gov.au. You can locate and screenshot the compliance status for your SMSF by searching using the ABN or fund name in the Super Fund Lookup service at <http://superfundlookup.gov.au/>

4.0 Declaration

I AUTHORISE (Please Tick the box) *ANZ relies on a 'click to authorise' method as evidence of your signature, so when you mark a "tick" in the 'I Authorise' box, you are deemed to be signing this form and indicating your intention to be bound by the choice of fund you make.*

Date

(Signature)



Tax File Number & Privacy:

You do not have to quote your TFN but if you do not provide it, your contributions may be taxed at a higher rate. Your TFN helps you keep track of your super and allows you to make personal contributions to your fund. ANZ is authorised to collect an employee's TFN under the Superannuation Industry (Supervision) Act 1993.

If you quote your TFN to ANZ for super purposes, your TFN will be provided to your super fund. It is not an offence for an employee not to quote their TFN. An employee may obtain further details regarding their privacy rights from their superannuation fund.

Things you should know:

- ANZ is not liable for the performance of your choice of super fund
- Any money you have in existing funds will remain there unless you arrange to transfer it (roll it over) to another fund
- Check the impact of any exit fees you will incur or benefits you may lose before leaving the fund (ANZ as your employer cannot do this for you)
- From 1 November 2021, when you start a new job at ANZ and do not advise of your choice of super fund by completing this form or select ANZ's nominated super fund, ANZ may need to check with the Australian Taxation Office if you have an existing super account to pay your super into