Suncorp WealthSmart® Change of advice fee form



Suncorp Portfolio Services Limited (Trustee) ABN 61 063 427 958 AFSL 237905 RSE L0002059

Adviser ID | | | | | | Issued 1 January 2014

Please use this form to let us know you've agreed to change your existing fee arrangements with your financial adviser (agreed by us).

Please note: If you're an employed member of a Suncorp WealthSmart Business Super employer plan, your employer agrees the ongoing fees applying to your super account with your adviser. You can't change these fees.

Tips to help you complete this form

- Use blue or black pen and CAPITAL letters
- Use a cross (X) to mark answer boxes

Any questions? If you'd like help completing this form, or if you have any questions, call us on 13 11 55 and ask for 'Super' between 8am and 6pm (Eastern Standard Time) Monday to Friday.

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Suncorp WealthSmart member number						
Title						
Last name						
Given name(s)						
Date of birth	d d / m m / y y y y					
Daytime phone number						
Email						
2. Your adviser details						
Suncorp WealthSmart adviser ID						

Suncorp WealthSmart adviser ID		
Last name		
Given name(s)		
Company name		
Licensee name		
Address		
Suburb/Town		
State	Postcode Postcode	
Daytime phone number	Mobile	
Email		
		1 1 1

3. Advice fee

Personal advice fee [*]							
Please complete this section if you have agreed on a fe	ee payable for personal advice provided by your advis	ser.					
One off payment							
Dollar amount P	Percentage						
\$, or	. _ % of account balance						
Monthly payment							
	Percentage						
\$ or							
The personal advice fee can be charged as a one off particle. Personal advice fees will appear as an advice fee on training the personal advice fees will appear as an advice fee on training the personal advice fees will appear as an advice fee on training the personal advice fees will appear as an advice fee on training the personal advice fees will appear as an advice fee on training the personal advice fees will appear as an advice fee on training the personal advice fees will appear as an advice fee on training the personal advice fees will appear as an advice fee on training the personal advice fees will appear as an advice fee on training the personal advice fees will appear as an advice fee on training the personal advice fees will appear as an advice fee on training the personal advice fees will appear as an advice fee on training the personal advice fees will appear as an advice fee on training the personal advice fees will appear as an advice fee on training the personal advice fees will appear as an advice fee on training the personal advice fees will appear as an advice fee on training the personal advice fees will appear as an advice fee on training the personal advice fees will appear as a fee of the personal advice fees will appear as a fee of the personal advice fees will appear an advice fee of the personal advice fee of the personal advice fees will appear an advice fee of the personal advice fees will appear an advice fee of the personal advice fees will appear an advice fee of the personal advice fees will appear an advice fee of the personal advice fees will appear an advice fee of the personal advice fees will appear and advice fees will appear advice fees and advice fees will appear advice fees and advice fees advice							
GST on the personal advice fee is included in the amou	unts stated above. Any personal advice fee will be de	ducted proportionately across all your investment					
options, excluding Suncorp WealthSmart Term Deposits ^Effective 1 January 2014 the name personal advice fer							
Enocave i dandary zer i ane name personal davice io	o replaced the optional advices convice rec.						
Adviser Service fee [*]							
Please complete this section if you have agreed on	a commission payable to your adviser for providi	ng ongoing service.					
No adviser service fee is payable on balances inves	sted in Suncorp WealthSmart Term Deposits.						
Suncorp Cash Fund*							
Max or % pa (0% pa – 0.54	45% pa max)						
All other investment options	MEN and an and						
Max or % pa (0% pa – 0.54	15% pa max)						
Insurance fee commission* Max or % pa (0% pa – 25.0	1% na may)						
This is charged as an ongoing fee.	o pa maxy						
Adviser service fees, excluding insurance fee commissi	ion, will appear as part of the administration fee on tr	ansaction statements and annual statements.					
^Effective 1 January 2014 the name adviser service fee							
Adviser remuneration details#							
Please specify the fees that apply to your account. If yo		a current for will continue to annly					
1 3 113 3	ou do not make any change to a particular lee, the	e current lee will continue to apply.					
Contribution fee*							
Max or % pa (0% pa – 4.0% pa	a max)						
Transfer fee* Max or	a movi						
Max or % pa (0% pa – 4.0% pa	a max)						
*These are the GST exclusive fees which will be deducted from your account. GST is then added to the remuneration paid to your adviser, which is not an additional cost to you. In some circumstances, the 0.545% pa max quoted for ongoing service fee includes a portion of the administration fee. #The member has the right to request the trustee to cease deducting all or part of an advice fee from the Suncorp Lifestage Fund. The trustee may at its absolute discretion refuse to deduct and/or pay an adviser service fee, personal advice fee or any other fee.							
4. Adviser declaration and signature							
Loopfirm the remuneration details provided on this f	form are true and correct and have been agreed a	with the member					
I confirm the remuneration details provided on this f	Torm are true and correct and have been agreed w	with the member.					
Adviser's signature		Date d d / m m / y y y y					
5. Member declaration and signature							
I confirm the remuneration details provided on this form are true and correct and have been agreed with my financial adviser.							
Signature							
Date dd/mm//yy	ууу						
Full name							
-	Suncorp WealthSmart® GPO Box 2585	Or fax to: 1300 172 693					
	Brisbane QLD 4001						