

# Application form



Complete this form to apply to become a member of Slate Super.

You can find detailed information about Slate Super in our Product Disclosure Statement (PDS), Additional Information Booklet, Insurance Guide, Financial Services Guide and Privacy Policy, all of which can be obtained from [www.slatesuper.com.au](http://www.slatesuper.com.au) or on request by phoning **02 8074 1772**.

This form may be posted to **Slate Super PO Box R1979, Royal Exchange NSW 1225** or scanned and emailed to [info@slatesuper.com.au](mailto:info@slatesuper.com.au).

## 1. Personal Details

Given Name(s)		Surname	
Date of Birth		Gender	
DD	MM	YYYY	Female      Male
Mobile Phone Number		Email Address*	
Residential Address		City	State      Postcode

\*By providing your email address, you consent and authorise us to send you communications or information, including information required by law, via email or similar technologies. Your details will never be passed onto a third party other than in accordance with our Privacy Policy. You can unsubscribe from our non-essential emails at any point or elect to receive communications by post by contacting Slate Super on **02 8074 1772** or via email at [info@slatesuper.com.au](mailto:info@slatesuper.com.au) or in writing at **PO Box R1979, Royal Exchange NSW 1225**.

## 2. Tax File Number

Tax File Number

You can find your TFN on statements you've received from the ATO, your super fund, your work payment summary, or alternatively you can contact the ATO on 13 28 61 for help finding it. By providing your TFN you are giving Simple Choice Super permission to use your TFN for superannuation purposes. This includes creating and administering your account, accepting personal contributions into your account, using the ATO's SuperMatch service to find lost or inactive accounts in your name, and actioning your rollover requests.

Choosing not to provide your TFN is not an offence, but it may mean that you pay higher tax on your investment and we will not be able to accept some types of contributions from you. The lawful purposes for which your TFN can be used, and the consequences for not quoting your TFN, may change in the future, as a result of legislative changes. For more information, refer to the PDS or contact us on **02 8074 1772**.

## 3. Investment Selection

By completing this form, you are choosing to have 100% of the balance of your Slate Super account invested in the Slate Super Lifestages investment strategy.

## 4. Declaration and Signature

By completing this form, I declare that:

- All the details I have provided are true and correct.
- I have read and understood the PDS, Additional Information Booklet and Insurance Guide to which this application applies.
- I have read the Privacy Statement (below) and understand how Slate Super will use my personal information.
- I accept that I will be bound by the provisions of the trust deed and rules which govern the operation of Slate Super.

I consent to Simple Financial Choices Pty Ltd (ABN 58 629 890 900; AFS Representative No. 001269407), a Corporate Authorised Representative of True Oak Investments Ltd (ABN 81 002 558 956; AFS Licence No. 238184), as the Sub-Promoter of Slate Super, receiving a Sub-Promoter Fee\* for providing all of the member services associated with my account, as well as for marketing the Fund.

\*The Sub-Promoter Fee is not an additional fee; it's a portion of the administration and investment-related fees that you pay as a member of the Fund. The fee is currently equal to 0.397% of funds under management per annum. We are required by law to make this disclosure to you and to ask for your consent to the payment of this fee.

Signature

Date

DD	MM	YYYY
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Print name

**PRIVACY STATEMENT:** By signing this form you consent to Slate Super collecting and using your personal information in order to establish and administer your super account, improve our products and services, keep you informed and comply with the relevant legislation. Your personal information is generally collected from you but sometimes it may be collected from third parties like your employer or another Australian super fund with whom you have an account. Your personal information may be disclosed to other parties, including the Trustee, the Fund Promoter, the Fund's Administrator, the Fund's Insurer and professional advisers, government bodies and the trustee of any other fund to which you transfer, in order to administer your account. To access your personal information or for a copy of our Privacy Policy, visit [www.slatesuper.com.au](http://www.slatesuper.com.au), phone **02 8074 1772** or email us at [info@slatesuper.com.au](mailto:info@slatesuper.com.au).