

# Application form

Slate

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 Strategy

Slate Super's investment solution, Slate Super Lifestages, selects from four pre-mixed investment options – Sand, Coral, Ocean and Sky – to create an investment strategy that's relevant to your gender, age and account balance. You can find more information about these investment options in Section 5 of the Product Disclosure Statement.

Please accept the below statement in order to proceed with your application:

I elect to have 100% of the balance of my Slate Super account invested in Slate Super Lifestages.

## 4. Declaration and Signature

By completing this form, I declare that:

- I have read and understood the PDS and confirm that all the information I have provided is true and correct.
- I acknowledge that my personal financial objectives, situation and needs have not been taken into account.
- I accept that I will be bound by the provisions of the True Deed which governs the operation of Slate Super.
- By providing my Tax File Number I give Slate Super permission to use my TFN for superannuation purposes.
- I have read the Privacy Statement (below) and consent to Slate Super using my personal information for the purposes as stated.

- I consent to Simple Financial Choices receiving a Sub-Promoter fee for providing ongoing information and general advice to me as a member of Slate Super.\*
- I acknowledge that other fees, costs and taxes may also affect my superannuation balance, and that I can access a full explanation of these fees, costs and taxes in the Slate Super Additional Information Booklet.

\* This fee is currently estimated to be 0.397% of your Slate Super account balance per year, deducted from the assets of the fund, plus \$1 per week from your account, deducted in arrears at the end of each month. This means that, for example, if you hold \$50,000 in your Slate Super account, you will pay Simple Financial Choices \$251.00 over a one-year period. By joining Slate Super you are authorising the payment of this fee. If you no longer wish to pay this fee, you can

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).