

Pay advice fees from your account

1800 005 166
info@spiritsuper.com.au
GPO Box 1547, Hobart TAS 7001

Important information

You can pay financial planning advice fees from your Spirit Super account if:

- the advice relates solely to your Spirit Super account
 - If you've received advice on other aspects of your financial situation, only the amount that relates to advice on your Spirit Super account can be paid from your Spirit Super account.
 - If the advice was provided to you and your spouse, only your share of the advice can be paid from your Spirit Super account.
- the advice was provided in writing in either a *Statement of advice* or *Record of advice* within the last six months
- your adviser appears on the ASIC financial advisers register and operates under an Australian Financial Services Licence (AFSL)
- payment of the advice fee won't reduce your Spirit Super balance below \$5,000 across all of your accounts.

Amounts paid from a Spirit Super account or a Transition Pension may attract a tax rebate when the fee relates to the review or management of your advice strategy, rather than implementing a new strategy.

Section 1 Your personal details

Member number

Date of birth (DD MM YYYY)

Last name

First name

Middle name/s

Residential address

Suburb/Town/City

State

Postcode

Preferred phone

Email

Section 2 Financial adviser details

Adviser's full name

Business / Trading name

Licensee name

AFSL number

ASIC financial adviser register number

Phone

Email



Section 3 Advice fee details

Advice fee to be paid from Spirit Super account (including GST) \$

Paid from Spirit Super account number

Type of advice – if you don't tell us, we'll assume you've received initial advice.

Initial e.g. preparation of a *Statement of advice*, implementing new strategies or setting up new investments or accounts.

OR

Review of your advice strategy, for example rebalancing the investments in your existing account.

Payment details – adviser to complete.

I've included a copy of the invoice addressed to the member with payment details.

Invoice reference:

Section 4 Member declaration

I authorise Spirit Super to pay the advice fee specified on this form from my nominated Spirit Super account.

I declare that:

- the information provided is true and correct
- the advice fee relates solely to advice provided about my Spirit Super account
- my adviser provided this advice to me in either a *Statement of advice* or a *Record of advice* within the last six months, and I understand that Spirit Super may request a copy
- I consent to the use of my personal information as outlined in Spirit Super's *Privacy policy* available at spiritsuper.com.au/privacy-policy or call us on 1800 005 166.

I acknowledge and accept that Spirit Super reserves the right to decline payment of advice fees at any time. I understand that if Spirit Super declines payment of the fee I'll need to pay the advice fee myself.

Your signature

Date (DD MM YYYY)

You MUST sign and date the member declaration above for this request to be valid.

Section 5 Adviser declaration

As the member's financial adviser, I declare that:

- the advice fee relates solely to advice provided about the member's Spirit Super interests
- I provided this advice to the member in either a *Statement of advice* or a *Record of advice* within the last six months, and I understand that Spirit Super may request a copy.

I acknowledge and accept that Spirit Super reserves the right to decline payment of advice fees at any time.

Adviser signature

Date (DD MM YYYY)

Adviser MUST sign and date the adviser declaration above for this request to be valid.



Return the completed, signed and dated form to info@spiritsuper.com.au or Spirit Super, GPO Box 1547, Hobart TAS 7001.

