

Zurich Insurance-only Superannuation Plan

Contribution advice

This form will enable us to correctly allocate all future superannuation contributions. These contributions are used for payment of insurance premiums only.



Contributions already made to your Zurich Insurance-only Superannuation Plan can only be reclassified under limited circumstances. If you want to reclassify contributions already made you should speak to either your financial adviser or Zurich Customer Care team on 131 551.

For information about contribution types and contribution rules - you can refer to the superannuation section of the ATO website ato.gov.au/super.

1 Member details

Existing Zurich Insurance-only Superannuation Plan policy number

Title	Surname	Given name(s)	
Residential address			State Postcode
Postal address (if different to residential address)			State Postcode
Contact details	Work ()	Home ()	
	Mobile	Email	

2 Future contribution details

In the table below please confirm the contribution type for **future** premium payments (this will not amend type of contribution recorded for previous contributions). Please note that unless you advise Zurich to the contrary, all future contributions will be classified as indicated below.

Concessional contributions

- Compulsory Employer (Superannuation Guarantee)
- Voluntary Employer
- Salary Sacrifice

Non-concessional contributions

- Personal
- Self-Employed
- Spouse
- Other (please specify)

3 Declaration

Please read and complete the following:

I hereby apply to the Trustee of the Zurich Insurance-only Superannuation Plan (of the Aon Master Trust) to change the contribution type for future contributions to my existing Zurich Insurance-only Superannuation Plan as set out in this form.

I acknowledge that unless I advise Zurich to the contrary, all future contributions will be allocated to the contribution type notified on this form.

I acknowledge that I am only able to reclassify future contributions.

I declare that I am eligible to contribute to superannuation in accordance with superannuation law and I will notify the Trustee immediately upon ceasing to be eligible to contribute.

I acknowledge that only certain payment options will meet the ATO's data and payment standards for superannuation contributions (these are referred to as SuperStream compliant payment methods).

Member's signature

Date

X / /

Privacy

Zurich is bound by the Privacy Act 1988 (Cth). In completing the forms or questions herein you will be providing us with your personal and, perhaps, sensitive information. The collection and management of this information is governed by the Privacy Act 1988. For a more detailed explanation of Zurich's Privacy Policy please visit our website at www.zurich.com.au or contact the Zurich Privacy Officer on 132 687 or email us at privacy.officer@zurich.com.au.

Any questions? Call 131 551

Please return the completed form to us:

By post, to **Zurich Australia Limited, Customer Care, Locked Bag 994, North Sydney NSW 2059**, or

By email, as a scanned attachment, to **client.service@zurich.com.au**