



PLEASE COMPLETE THIS FORM IF YOU ARE SELF-EMPLOYED AND/OR ONLY MAKING PERSONAL CONTRIBUTIONS.

Please complete all relevant sections using CAPITAL LETTERS and a BLACK pen.

Step 1 Your personal details

Date of birth (dd/mm/yyyy)

/ /

Please cross [X] the appropriate box: Mr Mrs Miss Ms Other (please specify)

Surname

First names

Residential/Street address (compulsory)

Remember to provide us with as many details as you can. This way we will be able to keep you updated with important super information.

Street / Unit number

Street name

Suburb / City / Town

State / Territory Postcode

Postal address - if different to residential

Street / PO Box number

Street name

Suburb / City / Town

State / Territory Postcode

Please send all correspondence to (please cross [X]): Residential address Postal address

Contact numbers

Home

Work

Mobile

Fax

Email address

Step 2 Tax File Number (TFN)

The fund is authorised to seek your TFN under the *Superannuation Industry (Supervision) Act 1993*.

I agree to provide my Tax File Number for the purpose outlined in the *LUCRF Super Member Guide (Combined Product Disclosure Statement and Financial Services Guide)* that accompanies this application.

I advise that my Tax File Number is:



0002

Step 3 Your beneficiary details

Please note: It is important that your listed beneficiary allocations total 100%.

Carefully consider the following:

In the event of your death, the Trustee will take into account your nomination of beneficiary(ies); however, it is not bound by your request. Please refer to our *Member Guide (Combined Product Disclosure Statement and Financial Services Guide)* for more information about beneficiaries you may nominate. You can change your nomination at any time by notifying the Fund in writing. You may nominate your personal legal representative if you do not have dependants.

First name and initial (eg. John D)	Relationship to you
<input type="text"/>	<input type="text"/>
Surname	% share
<input type="text"/>	<input type="text"/>
First name and initial (eg. John D)	Relationship to you
<input type="text"/>	<input type="text"/>
Surname	% share
<input type="text"/>	<input type="text"/>
First name and initial (eg. John D)	Relationship to you
<input type="text"/>	<input type="text"/>
Surname	% share
<input type="text"/>	<input type="text"/>
First name and initial (eg. John D)	Relationship to you
<input type="text"/>	<input type="text"/>
Surname	% share
<input type="text"/>	<input type="text"/>
First name and initial (eg. John D)	Relationship to you
<input type="text"/>	<input type="text"/>
Surname	% share
<input type="text"/>	<input type="text"/>
First name and initial (eg. John D)	Relationship to you
<input type="text"/>	<input type="text"/>
Surname	% share
<input type="text"/>	<input type="text"/>

MUST TOTAL 100%

If you would like to add more beneficiaries, attach your own list to this form, or call us on **1300 130 780** to obtain a *Change of details form*.

Insurance

When you join LUCRF Super as a Personal Plan member you are able to apply for Death Only, Death and Total & Permanent Disablement and Income Protection through LUCRF Super.

A majority of Australians are dramatically underinsured. LUCRF Super encourages members to choose the level of cover that is best for them. Insurance provides peace of mind for you and your family in the event that you pass away or become permanently disabled.

By having insurance through LUCRF Super, the premiums (cost) are deducted directly from your superannuation, not your bank account – so there is no need to budget for this as a separate family or personal expense.

To learn more or to apply for insurance with LUCRF Super, read the insurance section in our Member Guide or visit www.lucrf.com.au.

Member Investment Choice

When you join LUCRF Super your contributions are automatically invested in the 'Balanced' (**default**) investment option.

This option has a mixture of 'growth' assets such as property and shares, and 'defensive' assets like fixed interest and cash.

If you want your contributions invested differently to the **default** option, you will need to complete a *Member Investment Choice form*.

Step 4 Contribution payment details

To activate your personal plan membership, you need to make a contribution into LUCRF Super.

Type of contribution

Please cross [X] the appropriate box:

- Personal contribution (after-tax)**
- Spouse contribution** – Please complete the *Spouse Contribution form*.
- Rollover** – Please complete the *Request to Transfer form*.

Method of payment (only if making a personal [after-tax] contribution)

Please cross [X] the appropriate box:

- Cheque Money Order BPAY®

Cheques and Money Orders should be made payable to 'LUCRF Super' and your name, address and contact phone number should be recorded on the back.

Date of payment (dd/mm/yyyy) / /

Payment amount \$

Please note: Personal Plan members will need to make an initial contribution in order to join the Fund.

Step 5 Members Online access

Members Online provides you with instant access to manage your contact details, and check your investment performance and your contributions history.

All new members of LUCRF Super are automatically registered for Members Online and issued with a temporary password.

If you would prefer not to have access, please indicate this by placing a cross [X] in the box below.

- I do not wish to have access to Members Online

Step 6 Your communication choices

LUCRF Super typically sends three letters to you each year – your Annual Statement and two editions of *MySuper*, our member newsletter.

We also take the opportunity to send members information we feel may be of interest to them about our services and products.

From time to time we may also take the opportunity to provide information to other financial institutions and service providers.

If you do not wish to receive additional information from time to time, please indicate this below. (You can alter your preferences at any time by getting in touch with us.)

- I do not wish to receive additional information from LUCRF Super (other than my Annual Statement and copies of *MySuper*)
- I do not wish to receive information from other financial institutions and service providers.

Step 7 Proof of identification (ID)

When you join LUCRF Super's Personal Plan, you will need to provide a certified copy of proof of identification.

The following are legally accepted documents:

EITHER

One of these documents only:

- Driver's licence issued under State or Territory law
- Passport

OR

One of the documents in **Section 1**, and one of the documents in **Section 2**:

Section 1

- Birth certificate or birth extract
- Citizenship certificate issued by the Commonwealth
- Pension card issued by Centrelink that entitles the person to financial benefits

AND

Section 2

- Letter from Centrelink regarding a Government assistance payment Notice issued by Commonwealth, State or Territory Government or local Council within the past twelve months that contains your name and residential address.

For example:

- Tax Office Notice of Assessment
- Rates notice from local Council

Certification of personal documents

All copied pages of ORIGINAL proof of identification (including all linking documents) need to be certified as true copies of the original document by a person authorised to do so.

The person who is authorised to certify the documents must sight the original and the copy and make sure that both documents are identical. They then must ensure that all pages are certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualifications and the date.

In accordance with Anti-Money Laundering and Counter-Terrorism Financing Rules Instrument 2007 (No.1), persons who can certify copies

of the originals as true and correct for these purposes include:

- A Pharmacist;
- A registered Medical Practitioner;
- A Police officer;
- A registrar or deputy registrar of a court;
- A Justice of the Peace;
- A permanent employee of Australia Post with two or more years continuous service;
- A Finance Company officer with two or more years of continuous service (with one or more finance companies);
- An officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having two or more years of continuous service;
- A member of the Institute of Chartered Accountants in Australia, CPA Australia or the National Institute of Accountants with two or more years continuous service;
- A Notary public officer;
- A Judge of a court;
- A Magistrate; or
- A Chief Executive Officer of a Commonwealth court.

Step 8 Sign and date this form

Remember to sign and date this form. Otherwise, we can not complete your request.

I hereby apply to the Trustee to join LUCRF Super on the terms and conditions contained in the Trust Deed and as amended from time to time.

I also acknowledge receiving and having read and understood the *Fund Member Guide (Combined Product Disclosure Statements and Financial Services Guide)* and this *Membership Application form* attached to that guide.

I confirm that all of the details given in this *Membership Application form* are accurate and complete and that I can become a member of LUCRF Super. I undertake to inform the Trustee if any of my information, as set out in this *Membership Application form*, changes.

I acknowledge that I have read and understood the information in the *LUCRF Super Member Guide* regarding the collection and use of my personal information for the purpose of establishing and administering my account.

I undertake to provide the Trustee with any further information relating to my membership of the Fund that is requested by the Trustee.

Sign (member signature)

X

Date (dd/mm/yyyy)

□□ / □□ / □□□□

Checklist

Before you send the form to us, make sure you have:

- Completed all relevant Steps and signed this form.
- Attached certified copies of Proof of ID documents.

Send this form to:

LUCRF Super
PO Box 211
North Melbourne VIC 3051

Fax: (03) 9326 6907

Email: mypartner@lucrf.com.au

If you need any help completing this form, please call us on **1300 130 780** or email mypartner@lucrf.com.au

Privacy

LUCRF Super is committed to the National Privacy Principles set down by the Federal Government (see www.privacy.gov.au) and has produced a Privacy Policy. For a copy of the LUCRF Super Privacy Policy call us on 1300 130 780 or visit www.lucrf.com.au