

Please use this form to request an automatic payment from your employer to the Heritage Bank Secure Super Account. You should not complete this form unless you have read and understood the current Secure Super Account Product Disclosure Statement (PDS).

Please send us your completed form via post to:

**Secure Super Account**  
**PO Box 190**  
**Toowoomba Qld 4350**

Please note: we require the original, please keep a copy for your records.

## Superannuation contributions

### Superannuation Guarantee Contribution S

I hereby authorise  (employer name)

to automatically transfer my employer superannuation guarantee contributions into the Heritage Bank Secure Super Account nominated in the 'Secure Super Account details' section below.

### Additional Salary Sacrifice Contribution S

I also hereby authorise  (employer name)

to transfer an additional \$  Insert dollar amount **or**  % Insert % amount

of pre-tax salary sacrifice personal superannuation contributions into the Heritage Bank Secure Super Account nominated in the 'Secure Super Account details' section below.

### Additional After-tax personal Contribution S

I also hereby authorise  (employer name)

to transfer an additional \$  Insert dollar amount **or**  % Insert % amount

of my after-tax salary into the Heritage Bank Secure Super Account nominated below.

## Details of employee's Secure Superannuation Account

Account Number

First Name

Last Name

Fund Name:

Heritage Bank Secure Super Account, Heritage Bank Limited ABN 32 087 652 024. AFSL and Australian Credit Licence 240984

Fund Address:

400 Ruthven St, Toowoomba Qld 4350

Fund Postal Address:

PO Box 190, Toowoomba Qld 4350

Fund Contact Number:

13 14 22

## Authority

- I hereby request and authorise you to automatically transfer payments as outlined above, using the details from the attached schedule of automatic transfer details until I advise otherwise in writing.
- I declare I have read and understood the current Secure Super Account Product Disclosure Statement.
- I have attached a letter from the authorised Retirement Savings Account institution stating that the Secure Super Account is a complying retirement savings account (RSA).
- I have attached written evidence from the Secure Super Account stating that Heritage Bank will accept contributions from my employer.

Name

Signature

Date

## Schedule of automatic transfer details for use by employer

Please transfer funds using the following methods:

### For automatic transfer into the Secure Super account

For employer or pre-tax salary sacrifice personal contributions

BSB: 8 8 0 - 0 0 3

Account Number:

For after tax personal contributions

BSB: 6 3 8 - 1 1 0

Account Number:

### For transfer via bpaY

Biller code: 5 3 5 7 7 3

Reference number for employer or pre-tax salary sacrifice personal contributions

Reference number for after tax personal contributions

## Secure Super Account Fund Compliance Letter

To whom it may concern

### Letter of Compliance - Secure Super Account

- 1) The Secure Super Account offered by Heritage Bank Ltd is a retirement savings account, within the meaning of the Retirement Savings Accounts Act 1997;
- 2) The Secure Super Account can accept contributions as provided for in the Act;
- 3) The Secure Super Account can accept online superannuation guarantee and other superannuation contributions from account holders and their employers. Online rollovers and transfers are also accepted;
- 4) Heritage Bank Limited (ABN 32 087 652 024, AFSL 240984) (Heritage) is an RSA Institution for the purposes of the Retirement Savings Accounts Act 1997 and has not had its approval as a RSE institution suspended or revoked under section 33 of that Act (which would prevent Heritage from accepting contributions to the Super Secure Account).

Yours sincerely



Jane Calder  
General Manager, Product Solutions