

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).

Superannuation Contributions

SUPERANNUATION GUARANTEE CONTRIBUTIONS

☐ 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 CONTRIBUTIONS

☐ 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 CONTRIBUTIONS

☐ 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 _____
Fund Address _____ Fund Postal Address _____
Fund Contact Number _____

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 TRANSFERS INTO THE SECURE SUPER ACCOUNT

For employer or pre-tax salary sacrifice personal contributions

BSB _____ Account number _____

For after tax personal contributions

BSB _____ Account number _____

For transfer via BPAY®

Biller code _____

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

Reference number for after tax personal contributions
