

# Macquarie Superannuation

## Direct debit request

Macquarie Investment Management Limited ABN 66 002 867 003 AFSL 237 492 RSEL L0001281.  
Macquarie Superannuation Plan ABN 65 508 799 106 RSE R1004496.



MACQUARIE

This form is to authorise us to debit another financial institution and make regular payments to your Macquarie Superannuation account.

PLEASE USE BLACK INK

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### Personal details

Title:  Full given name(s):   
Surname:  Account number:

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### Direct debit details

This form is used to establish or amend a **regular savings plan**. One-off contributions can also be made by BPAY®, Cheque or EFT.

**A. Type of request**

- New plan (a copy of a bank statement that is less than six months old is required when debiting non-Macquarie accounts)
- Amendment to an existing plan
- Cancel an existing plan

**B. Frequency** (contributions will be deducted on, or close to, the 8th day of each month)

- One-off contribution, date to be deducted:  (if left blank, this will be deducted immediately)
- Monthly
- Quarterly in March, June, September and December
- Half-yearly in June and December
- Annually in June

**C. Total amount** \$

Super Manager/Consolidator minimum: \$250.

Super Accumulator minimum: \$100

**D. Contribution type** (please select one only)

- Personal contribution\*
- Employer superannuation guarantee contribution
- Employer salary sacrifice contribution
- Employer other contribution
- Spouse contribution
- Child contribution

Direct debit contributions will be deposited to your Cash Account/Hub on the second business day following the deduction. When nominating your contribution complete the gross amount. Contributions tax, where applicable, will be deducted from the gross amount.

\* To claim a deduction, we require you to complete a *Deduction notice for personal contributions* available from [macquarie.com.au](http://macquarie.com.au) or the NAT 71121 form, available from the Australian Tax Office website.

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## Australian financial institution details

Australian financial institution name:

BSB:    -    Account number:

Account name:

I have attached a copy of a bank statement that is less than six months old for the account to be debited (not required when debiting Macquarie accounts).

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## Declaration and signature

I/We wish to participate in the Wrap Superannuation (which consists of Macquarie Super Manager, Super Consolidator and Macquarie Super Accumulator) direct debit and I/we agree to be bound by the service agreement terms and conditions. I/We request you, until further notice in writing, to debit the nominated account with any amount which Macquarie Investment Management Limited ABN 66 002 867 003 AFSL 237 492 RSEL L0001281 (User ID 013402) may debit or charge me/us in connection with my/their Superannuation direct debit, through BECS (Bulk Electronic Clearing System).

I/We have completed all relevant sections of this form. I/We understand and acknowledge that:

1. My/Our nominated financial institution may in its absolute discretion decide the order of priority of payment by it of any monies pursuant to this request or any authority or mandate.
2. The financial institution may, in its absolute discretion, at any time by notice in writing to me/us, terminate this request as to future debits.
3. Macquarie may, by prior notice in writing to me/us within 14 days, vary the timing of future debits.
4. Monthly contributions will be deducted on, or close to, the 8th day of each month. Where the 8th day of the month does not fall on a business day and I am/we are uncertain whether sufficient cleared money will be available to meet the direct debit, I/we will contact the financial institution directly and ensure that sufficient cleared money is available.
5. I/We can modify or defer this direct debit at any time by giving Macquarie 14 days notice, in writing. I/We need to do this by the 24th day of the month for the change that I/we am/are requesting to take effect in the following month.
6. I/We can stop or cancel this direct debit at any time by giving Macquarie 14 days notice in writing. I/We need to do this by the 24th day of the month for the cancellation to take effect in the following month. Alternatively, I/we can cancel my/our direct debit by taking all of my money out of Wrap Superannuation.
7. If at any time I/we feel that a direct debit against my nominated account is inappropriate or wrong it is my/our responsibility to notify Macquarie as soon as possible.
8. Direct debiting through BECS is not available on all accounts. I/We can check my account details against a recent statement or check with the financial institution as to whether I/we can request a direct debit from my/our account.
9. It is my/our responsibility to ensure that there is sufficient cleared money in my/our nominated account to honour the direct debit request (DDR) for my/our direct debit. I/We understand that my/our direct debit will be automatically cancelled if three direct debit payments are dishonoured because of insufficient money within a 12 month period. Macquarie will give me/us 14 days notice in writing if they intend to cancel my/our plan. Macquarie will also charge the cost of dishonoured direct debits and any loss in the price of the units I/we was/were due to buy against my/our account.
10. Macquarie may need to pass on details of my/our direct debit request to their sponsor bank in BECS to assist with the checking of any incorrect or wrongful debits to my/our nominated account.
11. Macquarie reserves the right to charge a maximum annual administration fee of \$24 for the processing of direct debits. However, we are not presently charging this fee and will give you 30 days notice if we decide to do so.

**This form must be signed by all account holders for the account being debited.**

Signature 1

Date:  Title:

Name:

If a company officer, your corporate title:

Signature 2

Date:  Title:

Name:

If a company officer, your corporate title: