



# TASPLAN

## Direct Debit Request



Use this form if you wish to make regular personal contributions to your super account through direct debit from your bank account.

**TASPLAN**  
Level 4, Reserve Bank Building  
111 Macquarie Street,  
Hobart TAS 7000  
GPO Box 1547, Hobart TAS 7001

Freecall: 1800 005 166  
Fax: 1300 737 736  
Email: info@tasplan.com.au  
Web: www.tasplan.com.au

When completing this form, please use a **black** pen and write in **BLOCK** letters.  
Once completed, please return to: **TASPLAN GPO Box 1547 Hobart TAS 7001**

### Section 1: Member details

Member Number										Date of Birth (DD/MM/YYYY)									
Mr/Mrs/Ms/Miss										Surname									
Given Names																			
Street Number / PO Box										Street Name									
Suburb / Town										State					Postcode				
Daytime Contact Number										I agree to provide my TFN									
										<input type="checkbox"/> NO <input type="checkbox"/> YES									

### Section 2: Details of the account to be debited

Name of Financial Institution																			
Street Number / PO Box										Street Name									
Suburb / Town										State					Postcode				
Name account is held in																			
BSB Number										Account Number									
Amount to be debited monthly										Deduction to commence (MM/YYYY)									
\$										deducted on 20th of each month									
										2 0									

### Section 3: Member declaration and signature

Please note that by sending Tasplan personal information about yourself, you are agreeing to the following:

- That you have read the Tasplan Privacy Statement and understand how Tasplan intends to protect your personal details, particularly in relation to the collection, storage, quality, use and disclosure (sharing) of personal information.
- That Tasplan can use it for the purposes of running your superannuation account.

If you have any questions about your rights under the privacy legislation, please call Tasplan on 1800 005 166.

It is not compulsory to provide Tasplan with your TFN, however if you do not, you may pay more tax than you have to. We are also unable to accept personal member contributions if we do not have your TFN. For details of our full policy regarding TFNs, refer to our Product Disclosure Statement on our website, or call 1800 005 166 to request a copy.

I/we request Tasplan Ltd (APCA User ID number 068013), until further notice in writing, to debit my/our account at the financial institution identified above and prescribed through the Bulk Electronic Clearing System (BECS). This authorisation is to remain in force in accordance with the terms described in the Service Agreement.

Your Signature										Co-Signature (all signatures are required for joint accounts)									
Date (DD/MM/YYYY)										Date (DD/MM/YYYY)									

82.5 1207 04 1

# Take Advantage of the Government's Co-Contribution Scheme

You may be eligible to earn up to \$1500 from the Federal Government by making personal contributions to your Tasplan account. Visit our website at [www.tasplan.com.au](http://www.tasplan.com.au) or call us on 1800 005 166 for more information about the Government's Co-contribution scheme.

## A FASTER WAY TO BUILD YOUR RETIREMENT SAVINGS

### Conditions of use

Deductions are made on the 20th of each month, or the next working day if the 20th falls on a public holiday or weekend.

To cancel or alter this direct debit agreement, Tasplan must receive confirmation in writing by the 10th of the month. Any advice after this date may not be processed in time for the transfer of funds on the 20th.

There must be enough money in the account on each day the deduction is due to occur.

If the deduction is dishonoured three times, this facility will cease immediately. A dishonour means that the deduction could not be made because there was not enough money in the nominated account.

If all your superannuation benefit is paid from Tasplan this deduction facility will cease automatically.

Direct debit will cease automatically when you reach age 65.

If you wish to continue making personal contributions after the age of 65, you must satisfy the following conditions under federal legislation:

- You must have worked at least 40 hours in a period of not more than 30 consecutive days during the financial year.
- Personal contributions cannot be accepted after age 74.
- You must notify us in writing of your employment situation and specify that you wish your direct debit to continue.

Provided you meet these requirements, you may continue making personal contributions up to age 74.

In accordance with Federal Government Legislation, all contributions must be preserved. This means that you can generally not access the money until genuine retirement after age 55.

### Direct debit service agreement

#### Why an agreement?

Through the Direct Debit Request, you are allowing us to debit amounts from your bank\* account. The amount, how often, and the date we will debit your account depends on what you instruct us to do and the Conditions of Use. (Note that Tasplan will debit your account once each month on the 20th.)

#### If Tasplan wants to change this agreement

We will notify you at least 14 days before making any changes to this agreement.

#### If you want to change your direct debit or make an enquiry

Please contact our Customer Service Team if you wish to:

- Delay or change your direct debit - you need to advise us in writing by the 10th of each month; or
- Cancel your direct debit - you need to advise us by the 10th of each month; or
- Dispute a debit that has been made from your bank account - Tasplan will respond to your initial dispute within five business days.

#### Weekends and public holidays

If the due date for your direct debit falls on a weekend or public holiday, we will debit your account on the next business day.

#### Make sure you have enough money in your account

You should make sure you have enough cleared funds in your account for us to debit your account. If there are insufficient funds, the direct debit will be dishonoured by your bank (note that some banks will charge you a dishonour fee if this happens).

If Tasplan is advised of a dishonour after all your benefit is paid out, you are liable to repay the dishonoured amount to Tasplan.

#### Privacy

We will keep your bank account details confidential except when a court order applies, if Tasplan's bank needs information about your account or if you give us written permission to reveal your bank details.

#### Check that you give us your correct details

Before completing this form, please check with your bank that:

- Your bank account accepts direct debiting (some accounts are not eligible e.g. business accounts; joint accounts may require both signatures); and
- The account number you give us is complete and correct (refer to your bank statement or contact your bank if necessary).

*\*Note: "Bank" could also mean other financial institutions.*

If you have any questions about completing this form, please call our Customer Service Team on:

**1800 005 166**

### Filling out this form:

**Please check with your financial institution whether your nominated account can accept direct debit. Some account types are not eligible and some Credit Unions do not permit direct debit.**

**BSB Number:** This number identifies the Bank/ State/ Branch at which your account is held. Please contact your financial institution if you are not sure of this number, or check your last bank statement.

**Account Number:** This number identifies your account. Please contact your financial institution or check your last bank statement to obtain this number.

**Membership Number:** This is your member number with Tasplan. Please check your last Tasplan statement for this number.

This information is of a general nature only. It has been prepared without taking into account your particular financial needs, circumstances and objectives. You should assess your own financial situation and read the Product Disclosure Statement (PDS) relating to the products before making a decision based on this information. You may wish to seek the help of an adviser to do so. Please call 1800 005 166 to obtain a copy of the Tasplan PDS.