

Partner Linking

M24



right by your side

Please complete this form to apply for partner linking.

If your partner is a Brighter Super member, you can link your accounts to reach the administration fee cap. This allows administration fees for eligible accounts to be calculated on the combined account balance, potentially reducing your percentage-based administration fees.

Any percentage-based administration fees which have been charged over the fee cap for the relevant financial year, will be credited proportionately to your accounts in the following year.

Send your completed form to: **membership@brightersuper.com.au**.

Personal Details Brighter Super respects your privacy. All personal information collected is protected in line with Brighter Super's Privacy policy.

Member number	Account number	Given name/s	
Surname		Date of birth / /	
Email	Phone number		
Residential address			
Suburb/town		State	Postcode
Postal address (if different to above)		State	Postcode

1 What would you like to do

Please tick (✓) the box and indicate your choice(s) below.

- ☐ I would like to link my account with my partner's Brighter Super account (complete section 2)
- ☐ I would like to remove the partner linking from my account. (proceed to declaration)*

*Please note, if you are removing partner linking from your account only one signature is required.

2 Partner Linking

Please link my account with my partners account, details provided below:

Member number	Full name	Date of birth / /
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Please sign on the following page

3 Declaration

By signing and submitting this form, I/we declare that:

- I/We are applying for our account(s) to be linked to the other party detailed on this form for the purpose of calculating the administration fee, and that the information disclosed in this form is true and correct.
- I/We have read the current *Product Disclosure Statement (PDS)* available at **brightersuper.com.au** and the Important Information section included with this form.
- I/We understand that our Partner linking arrangement will not be valid if, prior to the rebate being paid:
 - Either linked party requests to be removed from the Partner linking arrangement, or
 - The linking arrangement otherwise ceases, or
 - Either linked party exits the Fund.
- I/We understand that Partner linking allows each account to only be linked once, and that by submitting this form, if we are already part of another Partner linking arrangement, this form will override the previous arrangement.
- I/We understand that the administration fee rebate can only be rebated to the account the fee was originally deducted from. I/We understand that this means that if an eligible account is closed prior to the rebate being paid in the following financial year, the impacted partner will not be entitled to that portion of the rebate.
- I/We acknowledge that fees will be deducted from our accounts over the year and that the rebate (if applicable), will be rebated back into our eligible accounts in the following financial year.
- I/We acknowledge that a Partner linking request can be accepted, rejected or cancelled by the Trustee at any time.

Member Signature	Date signed / /
Partner Signature (not required when removing a partner)	Date signed / /

If you are signing on behalf of the member please complete section 4.

4 Power of Attorney signature

Complete this section if you are signing this form on behalf of the member in your capacity as the member's attorney.

By signing this form you are declaring that:

- you are nominated as an attorney on the member's Power of Attorney document and are authorised to act on the member's behalf for financial matters; and
- to the best of your knowledge and belief your appointment under the Power of Attorney document has not been revoked or otherwise withdrawn.

If more than one attorney has been appointed all attorneys will need to print their name, sign and date the form unless authorised to act severally.

Attorney 1	Signature	Date signed / /
Attorney 2	Signature	Date signed / /
Attorney 3	Signature	Date signed / /
Attorney 4	Signature	Date signed / /

Please sign in blue or black pen - Brighter Super does not accept digital signatures for attorney/s.

Please (✓) one of the options below:

- ☐ I have attached valid Power of Attorney documentation.
- ☐ I have previously supplied a valid Power of Attorney document to Brighter Super.

Now you have completed this form and signed the declaration, please send it to us by:

Email (scanned copy)
membership@brightersuper.com.au

Post Brighter Super
GPO Box 264
Brisbane Qld 4001

Website (Secure file upload)
brightersuper.com.au/contact-us



Important Information

1. Privacy and personal information

Brighter Super respects your privacy. All personal information collected on this form is protected in line with *Brighter Super's Privacy Policy*. To find out more about how we collect and manage your personal information, please refer to our *Privacy Policy* available from our website brightersuper.com.au/privacy.

2. Maximum number of members

A maximum of two members may be linked together for Partner linking, there is no maximum number of accounts that can be linked. Any new Partner linking form received will override any previous nomination.

3. Visibility of information

By participating in Partner linking your full name will be visible via Member Online to the individual that your account has been linked to and vice versa. The linked individuals will not be able to view any other information or transact on each other's account/s. Visibility of each name is required to allow the Partner linking to be recorded on our administration systems for the purposes of calculating and applying the administration fee refund.

4. Eligible accounts

Only accounts that have a cap on administration fees will be included in the combined account balance used to calculate the administration fee rebate after Partner linking. This includes Brighter Super Accumulation and Brighter Super Pension accounts. Defined Benefit and Classic Pension accounts do not have an administration fee cap, and therefore these accounts are excluded from Partner linking.

Partner linking is not available if your account is invested entirely in the MySuper investment option. If your account is invested in MySuper and other investment options, then only the balances invested in other investment options will be considered for the combined account balance used to calculate the administration fee rebate.

5. Power of Attorney

For a Power of Attorney (PoA) to be accepted, we require the forms to be posted through to us at GPO Box 264, Brisbane QLD 4001. Please ensure your documents have been certified on each page, and you have included certified ID for the attorney(s) nominated in the PoA, see our Proof of identity requirements information at brightersuper.com.au for more details.