

Your Privacy

The Crescent Wealth Superannuation Fund is administered by us along with our service provider, Mercer Outsourcing (Australia) Pty Ltd. We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information about the other products and services offered by us and our related companies. If you do not wish to receive marketing material, please contact us on **1300 926 626**.

Our Privacy Policies are available to view at www.crescentwealth.com.au/privacypolicy or you can obtain a copy by contacting us on **1300 926 626**.

If you do not provide the personal information requested, we may not be able to manage your superannuation.

We may sometimes collect information about you from third parties such as your employer, a previous super fund, your financial adviser, our related entities and publicly available sources.

We may disclose your information to various organisations in order to manage your super, including your employer, our professional advisors, insurers, our related companies which provide services or products relevant to the provision of your super, any relevant government authority that requires your personal information to be disclosed, and our other service providers used to assist with managing your super.

In managing your super your personal information will be disclosed to service providers in another country, most likely to Mercer's processing centre in India. Our Privacy Policies list all other relevant offshore locations.

Our Privacy Policies set out in more detail how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact us on **1300 926 626** or write to our Privacy Officer, GPO Box 4650 Melbourne VIC 3001.

Step 3 - Sign the form

I confirm that:

- the amount to be deducted from my super account is solely in relation to advice provided to me in relation to my super benefits in the Crescent Wealth Superannuation Fund.

I understand and agree that:

- the fee nominated will be deducted from my super account by the trustee's administrator on receipt of all required information.
- information contained in this form will be used by the trustee to process my request to deduct a personal advice fee from my super account, and if necessary, to update my Crescent Wealth Superannuation Fund member records so that we can contact you more efficiently in the future regarding your account.
- the value of my super in the Crescent Wealth Superannuation Fund will decrease by the amount of the fee paid from my super account in accordance with my request
- the trustee may not be able to action my request where the trustee has been notified of family law proceedings in relation to my super.

I agree that:

- my request will not be processed if:
 - I have not completed Step 2 and signed this form; or
 - my current balance in the Crescent Wealth Superannuation Fund is less than \$2,000; or
 - the balance remaining in my super account after deduction of the fee will be less than \$2,000.
- I understand and consent to my information being collected, disclosed and used in the manner set out in this form.

Signature

X

Date

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Adviser use only

Adviser name

Adviser's company

AFSL number

AFSL Licensee name

Adviser's Phone

Email

Banking Details

Name of institution

Account name

BSB

Account number

Adviser declaration and signature

I/We hereby agree for all payments by Crescent Wealth Superannuation Fund for goods and services supplied to be made by way of direct credit to the bank account details above.

I/We hereby guarantee that the following details are correct, and agree to indemnify Crescent Wealth Superannuation Fund against any loss or damage suffered if the details provided are incorrect.

The information provided will be used solely for financial management and will not be used for any other purpose.

I confirm that the personal financial advice fee to be deducted from the member's super account balance is solely in relation to their super benefits in the Crescent Wealth Superannuation Fund.

Signature of adviser

Date

Please return the completed form to Crescent Wealth Superannuation Fund, GPO Box 4650, Melbourne VIC 3001.