



For changes/alterations please complete this form. Please ensure you have read the Super Directions for Business Product Disclosure Statement (PDS), dated 21 June 2007. This form is effective from 1 July 2007.

Please note that AXA will not be able to process your request unless all mandatory sections are completed. These are sections 1, 2 and 7.

**1 Plan details (mandatory section)**

<input type="text"/>	<input type="text"/>	<input type="text"/>
Plan name	Plan reference	Member reference

**2 Member details (mandatory section)**

<input type="text"/>	<input type="text"/>	<input type="text"/>		
Title	Given name(s)	Surname		
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>
Street number and name		Town/Suburb	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>		
Home telephone	Work telephone	Occupation		

**3 Tax file number notification**

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------

If a non-resident does not quote a TFN, the Trustee must withhold the prescribed rate of tax when paying a lump sum benefit.

**4 Changes to nomination of dependants (optional section)**

Refer to the 'Death benefit beneficiary nomination form' at the back of this PDS.

**5 Changes to investment choice (optional section)**

The investment choices you make will affect the performance of your superannuation.

Before you decide on your investment portfolio(s), we recommend that you speak to your financial adviser.

If you do not make a choice, contributions received may be invested in accordance with your previous instructions, or if you have not given any instructions in the Multi-manager Balanced or Series 2 – Multi-manager Balanced portfolio. Please note: If your account balance is below \$1,200, your money will initially be invested in the Protection portfolio.

You can choose up to a maximum of six portfolios for your existing retirement accumulation (minimum of \$1,000 in any one portfolio) and for your future contributions.

**Please turn over to complete this section.**

Your investment choice will start the following business day after the form is received, unless you specify a later start date:

/ /

	Investment portfolios for FUTURE contributions	Please switch my current retirement accumulation FROM (COLUMN A) TO (COLUMN B)	
<b>Multi-manager Diversified portfolios</b>			
Secure	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
Secure Growth	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
Balanced	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
Growth	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
High Growth	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
<b>Series 2 – Multi-manager Diversified portfolios</b>			
Series 2 – Secure	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
Series 2 – Balanced	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
Series 2 – Growth	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
Series 2 – High Growth	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
<b>Successor Fund portfolio</b>			
Guaranteed Plus*	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
<b>Multi-manager Sector portfolios</b>			
Cash	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
Australian Fixed Interest	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
International Fixed Interest	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
Property	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
Australian Equities	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
International Equities	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
<b>Individual Manager portfolios</b>			
AXA – Australian Monthly Income Fund	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
Macquarie Master Fixed Interest Fund	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
AXA – Wholesale Australian Fixed Income Fund	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
Credit Suisse International Fixed Interest Fund	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
AXA – Wholesale Global Fixed Income Fund	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
AMP Capital Listed Property Trusts Fund Class A Units	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
AXA – Wholesale Australian Diversified Property Securities Fund	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
Colonial First State Wholesale Imputation Fund	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
Merrill Lynch Wholesale Australian Share Fund	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
AXA – Wholesale Australian Equity – Industrials Fund	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
Perpetual's Wholesale Industrial Fund	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
AXA – Australian Equity – Value Fund	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
ABN AMRO Global Equity Fund	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
Fidelity Global Equities Fund	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
AXA – Wholesale Global Equity – Value Fund	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
AXA – Wholesale Global Equity – Growth Fund	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>	<input type="text" value=""/> % or \$ <input type="text" value=""/>
	<b>100%</b>	<b>The total % or \$ amount specified in COLUMN A must also be specified in COLUMN B.</b>	

\* This portfolio is only available to members of plans which transferred from NM Simple Super and NM Tailored Super under the successor fund transfer provisions.

**6 Changes to insurance benefits (optional section)**

**This section defines your insurance benefits. We recommend that you speak to your financial adviser before you make any changes to your insurance.**

Complete the insurance benefit section below **ONLY** if you would like to define or change your own insurance benefits.

The insurance choices you make could have a significant effect on your superannuation.

- If you select the nominated amount or multiple of salary benefit basis, Total and Permanent Disablement insurance cover, after you attain age 60, your insurance cover will reduce progressively by 20 per cent at each annual review to zero at the annual review following your 65th birthday as described in the PDS.
- If you are a casual employee or a permanent employee working less than **15 hours per week**, you can select one or two units of death only cover, and you are not eligible for Total and Permanent Disablement Insurance cover.

**Is health evidence required?**

- If the level of cover provided to you under your employer arrangement is in excess of the plan Automatic Acceptance Limit.
- If you select a different benefit basis than that provided to you under your employer arrangement.
- If Automatic Acceptance does not apply.

**Smoking status**  Smoker    ▶ **Have you smoked in the past 12 months?**  Yes  No  
 Non-smoker    ▶ **Have you smoked in the past 12 months?**  Yes  No

**Work status**  Permanent full time  
 Permanent part time    ▶ **Hours worked per week**  Less than 15  15 or more  
 Casual

**(i) Select benefit type** (please tick **ONE** option only)

- 1** No insurance
- 2** Death only ▶ Complete section **(ii)**
- 3** Death and Total and Permanent Disablement ▶ Complete section **(ii)**
- 4** Death and Salary Continuance ▶ Complete sections **(ii)** and **(iii)**
- 5** Death, Total and Permanent Disablement and Salary Continuance ▶ Complete sections **(ii)** and **(iii)**

**(ii) Select benefit basis 1, 2 or 3****1 Units of insurance** (Refer to your financial adviser for the amount of cover for each unit)

Please enter number of units of insurance  units

OR

**2 Nominated amount**

Enter the amount of insurance you would like and then select from A or B  \$

- A** Nominated amount only
- B** Nominated amount linked to Consumer Price Index (CPI)

OR

**3 Salary multiple**

Select from E or G and then enter a salary multiple

- E** Multiple only  times salary
- G** x% of salary multiplied by term to selected retirement age  Value of X  
(subject to a maximum of Y multiplied by salary)  Value of Y

**(iii) Salary continuance** (please complete this section **ONLY** if you selected benefit type 4 or 5)

**Waiting period**  30 days  60 days  90 days    **Amount of benefit**  % of annual salary (maximum 75%)

**7 Member declaration (mandatory section)**

**Privacy – Use and disclosure of personal information**

The privacy of your personal information is important to you and also to AXA. The purpose of collecting your information is to assess your application for, and manage your membership of, the Fund.

If you are also applying for insurance cover, we will collect additional information about you and your immediate family background that is necessary for the purpose of assessing your application for insurance, or any claim you may make, and managing your Plan. This includes information about health, financial situation, occupation and lifestyle. If the information you give us is not complete or accurate, we may not be able to provide you with the products and services you have applied for.

In assessing your application for, and managing your membership of, the Fund, we may need to disclose your personal information to other parties, such as other providers of retirement and savings products, the Australian Taxation Office, a financial adviser, your employer, re-insurers, medical and financial professionals, judicial or dispute resolution bodies and AXA Australia Group companies.

We will only use information about your nominated preferred dependant(s) or legal personal representative in the event of your death.

The Trustee does not give your personal details to any external parties for their marketing purposes.

In the future, we may contact you about new products or special offers. If, at any time, you do not want to receive this information you can opt out by telephoning 133 056 and quoting your plan number.

You are entitled to request reasonable access to information we have about you. We reserve the right to charge an administration fee for collating the information you request.

For our policy on Privacy refer to [www.axa.com.au](http://www.axa.com.au) or contact AXA Customer Service on 133 056.

**Member declaration**

I accept responsibility for the choices I have made on this form and acknowledge that neither my employer nor the Trustee shall be liable for any loss due to an inappropriate choice made by me.

I have read and understood the Privacy Disclosure Statement. I consent to my personal information being collected and used in accordance with the Privacy Disclosure Statement. I acknowledge that I can opt out from the use of that information for the purpose of direct marketing by telephoning 133 056.

X

Member's signature

| |

Date

**Please note that AXA will not be able to process your request unless all mandatory sections are completed. These are sections 1, 2 and 7.**

**Tax file number notification**

We are required to advise you of the following before you provide us with your tax file number (TFN).

Your tax file number is confidential. Before you provide your tax file number we are required to tell you the following:

- 1 Tax file numbers are collected under the Superannuation Industry (Supervision) Act 1993, Retirement Savings Accounts Act 1997, the Privacy Act 1988 and taxation acts (including the income tax).
- 2 The Trustee and Fund Administrator will only use your tax file number for superannuation purposes, including:
  - Finding or joining together your superannuation benefits
  - Calculating the correct tax on employment termination payments
  - Passing it to the Trustee of another superannuation fund or provider of a retirement savings account when transferring your benefits. You may give us written instructions not to pass it on before any transfer
  - Passing it on to the Australian Taxation Office (ATO):
    - if we have paid you a benefit,
    - to report contributions, or
    - if you have unclaimed superannuation money after reaching the aged pension age.

These purposes may change in the future as a result of legislative changes.

**What happens if I do not quote my TFN**

You are not obliged to provide your TFN to your superannuation fund. However, if you do not provide your TFN your fund may be taxed at the highest marginal tax rate plus the Medicare levy on contributions made into your account in the year, compared to the concessional tax rate of 15%. Your fund may deduct additional tax from your account.

If your superannuation fund does not have your TFN, you will not be able to make personal contributions to your superannuation account.

If you are a non resident and you do not provide a TFN, the Trustee must withhold the prescribed rate of tax when paying a lump sum benefit. A tax exemption code is not recognised as valid TFN.

Choosing to quote your TFN will also make it easier to keep track of your superannuation in the future.