ENERGY INDUSTRIES
SUPERANNUATION SCHEME

Accumulation Scheme

Application for Membership

Please complete in capital letters and in BLACK INK only

You should read 'Important Notes' and refer to the Product Disclosure Statement (PDS) (available from Member Services) before completing this form.

This form is to be completed if you wish to join the Energy Industries Accumulation Scheme.

Please note that you may also elect:

- an Investment Strategy by completing Section 2, and
- to make personal contributions (via regular payroll deduction, or single payment) by completing Sections 3 and/or 4.

Please complete the Application section(s) below with your personal details and sign where indicated

1. Your details

Member no. *To be allocated* Date of birth *(dd/mm/yyyy)* / /

Title *(e.g. Mr/Mrs/Ms/Miss/Dr)*

Family name

Given name(s)

Contact Details (postal address, telephone, email)

No./Street/PO Box

Suburb/Town/City

State/Territory Postcode Country (if outside Australia)

Phone: Home no. (inc. STD/ISD) Business no. (inc. STD/ISD)

Mobile no. Fax no. (inc. STD/ISD)

E-mail address

Residential Address

☐ **Same as Postal Address above**

☐ **Different from Postal Address above – you MUST complete below**

No./Street

Suburb/Town/City

State/Territory Postcode Country (if outside Australia)

Are you already a member of an Energy Industries Superannuation Scheme? ☐ **yes** ☐ **no** **If yes, please indicate below**

Tick as relevant ☐ Retirement Scheme ☐ Executive Scheme ☐ Defined Benefit Scheme

and state your Member number

Employer name

Date commenced employment / /

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2. Your investment strategy

You can invest your super in one, or a combination of the five investment strategies outlined below. Once your investment is established, you also have the option of having a different investment allocation between your current account balance and future contributions. Please see the website or contact Member Services for more information.

I elect to have my account balance invested on the following percentage basis*:

High Growth	Diversified	Balanced	Capital Guarded	Cash
%	%	%	%	%

Date of election

(You only need to complete this part if you want your election to commence on a date that is later than the 'effective date' – see Important Notes).

Date you wish your election to become effective *(dd/mm/yyyy)* / /

*** Note: If the total of your percentage split does not equal 100%, your election will be invalid. See the Important Notes as to what happens if you make an invalid election**

3. Optional regular contributions – **(Payroll Deductions) If you wish to have regular contributions deducted from your pay, please complete this section. Your Payroll Officer must sign where indicated and retain a copy of this page.**

WARNING – There are limits to the amount of concessional and non-concessional contributions that you or your employer can make to the Scheme that will be taxed concessionally. Furthermore we will not be able to accept any non-concessional contributions made on your behalf if we don't have your Tax File Number. See the Important Notes for further information.

CONCESSIONAL CONTRIBUTIONS

☐ **OPTIONAL EMPLOYER CONTRIBUTIONS (PRE-TAX & SALARY SACRIFICE*)**

How much do you want your employer to deduct from your gross salary or wages?

$ PER ☐ week ☐ fortnight ☐ month

NON-CONCESSIONAL CONTRIBUTIONS

☐ **OPTIONAL MEMBER CONTRIBUTIONS (AFTER-TAX)**

I wish to make optional member contributions by regular deductions from my pay :

$ PER ☐ week ☐ fortnight ☐ month

* Optional employer contributions are subject to your employer's agreement.

INDEMNITY

In consideration to your consenting to make such deductions and payment as above, I agree for myself, my executors, administrators and assigns, to hold my employer:

Employer name

and every employee thereof, harmless and indemnified against any claim arising out of any act or omission to act in pursuance of this authority or any failure to make deductions and remittances as authorised herein. This authority cancels any existing Energy Industries Superannuation payroll deduction authority and continues until it is withdrawn by me in writing.

Signed Date *(dd/mm/yyyy)* / /

PAYROLL MANAGER TO COMPLETE:

I agree to deduct payment from the above-named member's pay in order to pay contributions to the Energy Industries Superannuation Scheme.

Signed Date *(dd/mm/yyyy)* / /

4. Single contribution - **If you wish to make a single contribution, please complete this section. You must attach your cheque made payable to "Energy Ind Super Scheme Pool A" and forward the completed form and cheque to the Scheme.**

I wish to make a single payment of: **$**

Please attach a cheque made out to "Energy Ind Super Scheme Pool A". The above amount will be credited to your account on the date we receive your cheque.

5. Applicant declaration

I declare that:

- I understand that Energy Industries Superannuation Scheme Pty Limited (ABN 72 077 947 285) (the "Trustee") can provide me with information but cannot give me investment advice and the Scheme PDS is a general guide and does not constitute investment advice.
- I understand that the Trustee is not responsible for my choice of investment strategy and that professional financial advice may assist me in making my decision.
- I understand that I may change my investment option at any time and that the first change in any financial year is free, however, subsequent changes attract a $20 switching fee.
- I have fully read this form and the information completed is true and correct.

Signed Date *(dd/mm/yyyy)* / /

IMPORTANT NOTES

You should read the Product Disclosure Statement (PDS) before completing this form. The PDS is available from Member Services and the Scheme's website.

MEMBER PROTECTED ACCOUNTS

If your account has less than $1,000 and you otherwise meet the member protection requirements, the Scheme ensures that any management fees deducted from your account do not exceed the interest earned on your account balance in any financial year. For further details refer to the PDS.

BASIC INSURANCE COVER

Basic Death and TPD cover is available only to 'full' members of the Scheme, ie members whose Energy Industries employer is paying Superannuation Guarantee (SG) contributions into the Scheme on their behalf.

This cover is not subject to any medical assessment and is provided automatically when you become a full member and are classed as being 'At Work'.

Full members may also elect not to have the basic cover. An election to cancel your cover can be made at any time and is effective from the end of the month following the date your request is received.

The cover provided is based on your age, and premiums are $15 per month for three units, irrespective of the amount of cover. Full details are explained in the PDS available from Member Services.

Members wishing to cancel cover should complete a *'Reduce or Cancel Basic Cover'* form[1].

DEFAULT STRATEGY

If you do not choose a strategy, your account will be invested in a default strategy based on your age. Full details are contained in your PDS or are available on the Scheme's website. Once you make a selection, it overrides the age-based default.

INVALID ELECTION

If you are a new member and your election is invalid your investment will be subject to the age based default as outlined in the PDS. If you are an existing member and your election is invalid your existing investment choice will continue.

INVESTMENT CHOICES

The Scheme provides you with the opportunity to choose just one or a combination of any of the five investment strategies to invest your existing account and future transactions. You also have the flexibility to invest your future transactions in a different mix to that of your current account.

You should refer to the PDS for full details of each investment choice before completing form.

REBALANCING OF YOUR ACCOUNT

Where your account balance and future contributions are invested in the same strategies and at the same percentages your total account will be automatically rebalanced each quarter. The trustee will monitor the actual proportions invested in your chosen strategies, as these proportions may vary with performance trends over time. The trustee will automatically make any necessary transfers between the underlying investments to ensure your account does not move out of line with your chosen strategy. Rebalancing will normally be done on a quarterly basis and is scheduled to be done at the end of February, May, August and November, however the rebalancing can be done at any stage during the quarter.

If you do not want this automatic rebalancing to occur then you need to contact Member Services.

Rebalancing will not be available if you elect to invest your account balance and future contributions using different strategies.

EFFECTIVE DATE OF INVESTMENT ELECTION

If you are a new member, the effective date of your investment strategy election will be the first Business Day the Scheme receives both this form and your funds.

If you are an existing member, the effective date of your investment strategy election will be the date the Scheme receives this form or if you have nominated a date, the effective date will be your nominated date provided it is a Business Day after the Scheme receives this form. If your nominated date is not a Business Day, the effective date will be the next Business Day immediately following your nominated date.

A Business Day is any day that the Australian Stock Exchange [i.e. both SEATS (Stock Exchange Automated Trading System) and DTF (Derivatives Trading Facility)] is open for trading in Australia.

TRANSFERRING FUNDS INTO YOUR ACCOUNT

The Accumulation Scheme can accept transfers of superannuation benefits from other funds (including, in some circumstances, transfer from the Retirement Scheme and Defined Benefits Scheme) whilst you remain employed with a Scheme employer. Such transfers can be arranged by completing a '*Transfer-in Authority*' form[1].

FEES AND CHARGES

Please see the PDS for full details on fees and charges.

HAVE YOU PROVIDED YOUR TAX FILE NUMBER (TFN) TO THE SCHEME

If you or your employer have not provided your TFN to the Scheme by the end of a financial year, then all your concessional contributions will be taxed at the top marginal tax rate, plus Medicare levy, if they exceed $1,000. For any accounts that begin after 1 July 2007, the $1,000 threshold does not apply. Furthermore, your Scheme will not be able to accept any non-concessional contributions from you if we do not have your TFN.

For this reason it is crucial that you consider providing your TFN to the Scheme, either directly or through your employer, as soon as possible (if you haven't already done so). You should also check your Member Benefit Statement to ensure that your TFN is correctly recorded. Further information concerning TFNs can be found in the PDS.

To give us your TFN, complete the attached "Notification of Tax File Number" Form and send it to us with this form.

CONTRIBUTION RULES

Concessional Contributions Cap

From 1 July 2009, any concessional contributions you or your employer make up to $25,000 (note that this amount is indexed to Average Weekly Ordinary Times Earnings but will only increase in $5,000 increments) a year will be taxed at 15%. If your concessional contributions exceed the $25,000 cap in a financial year the excess will be taxed at the top marginal rate plus Medicare levy.

Non-Concessional Contributions Cap

Non-concessional contributions to super are limited to $150,000 (note that this amount is linked and capped at six times the concessional contribution limit) a year if you are 64 years or younger, or 65 years to 74 years old and satisfy the work test (that you are gainfully employed for at least 40 hours during a consecutive 30 day period each year a contribution is made). If you are younger than 65, you can bring forward these contributions out to a limit of $450,000 over three years. For more information please see the PDS or contact Member Services.

If you exceed the non-concessional cap, the contributions in excess of the cap will be taxed at the top marginal tax rate plus Medicare levy.

Transitional Arrangements

There are transitional arrangements in place for certain members to make concessional and non-concessional contributions over and above the caps without incurring any higher tax. For more information see our website, the PDS or contact Member Services.

VOLUNTARY INSURANCE COVER

Voluntary insurance cover may be available through a Group Insurance Policy arranged by the Trustee. A brochure and application form may be obtained from Member Services.

PROTECTING YOUR PRIVACY

Some of the personal information you are requested to provide is required to establish and maintain your membership in Energy Industries Superannuation Scheme while other information is required under Australian Government Anti-Money Laundering and Counter-Terrorism Financing measures.

The Trustee is fully committed to comply with the National Privacy Principles in the way in which your personal information is stored and used. Full details of how this is achieved are contained in the Trustee's Privacy Policy, which is available from Member Services or on the Scheme's website at www.eisuper.com.au.

[1]*Forms are available from Member Services or the Energy Industries Superannuation Scheme website – see "Where to send this form/enquiries" below for details*

TRUSTEE INFORMATION

Please note that the information contained in this document is of a general nature only and does not constitute personal advice as it does not take into account your personal objectives, financial situation or needs. Any advice in this document is provided by FuturePlus Financial Services Pty Ltd (ABN 90 080 972 630) as an Australian Financial Services Licensee (AFSL 238445) on behalf of the Trustee of the Energy Industries Superannuation Scheme, Energy Industries Superannuation Scheme Pty Ltd (ABN 72 077 947 285). Energy Industries Superannuation Scheme Pty Ltd is an APRA Registrable Superannuation Entity Licensee (ABN Pool A – 22 277 243 559 and ABN Pool B – 64 322 090 181).

Members should not rely solely on this information and should consider their own personal objectives, financial situation and needs before acting on this information. Prior to making any investment decision you should obtain and consider the relevant Product Disclosure Statement (PDS) pertaining to your Scheme membership and seek professional investment advice.

What to do next

Please ensure:

- If you have completed Section 3 "Optional regular contributions", you AND your payroll officer have signed and dated your payroll deduction request AND your payroll officer has retained a copy of this form;
- If you have completed Section 4 "Single contribution", you have attached a cheque made payable to "Energy Ind Super Scheme Pool A" to this form;
- You have signed and dated Section 5 "Applicant declaration".

Now please send this form to the Scheme address below.

Where to send this form/enquiries

Energy Industries Superannuation Scheme	Phone: 1300 369 901
PO Box N835	(8.30 am – 5.00 pm Mon – Fri)
GROSVENOR PLACE NSW 1220	
website: www.eisuper.com.au	enquiries: info@eisuper.com.au

DO NOT FAX THIS FORM AS YOUR ORIGINAL AUTHORISATION IS REQUIRED

ENERGY INDUSTRIES
SUPERANNUATION SCHEME

Accumulation Scheme

Notification of Tax File Number (TFN)

Under Superannuation Law, the Trustee must request that you supply your Tax File Number for superannuation purposes. Collection of your TFN by the Trustee is authorised by tax laws, the Superannuation Industry (Supervision) Act 1993 and the Privacy Act 1988.

1. Your details. Please complete in capital letters and in BLACK INK only

Member no. *To be allocated*

Date of birth *(dd/mm/yyyy)* / /

Title *(e.g. Mr/Mrs/Ms/Miss/Dr)*

Family name

Given name(s)

Contact Details (postal address, telephone, email)

No./Street/PO Box

Suburb/Town/City

State/Territory

Postcode

Country (if outside Australia)

Phone: Home no. (inc. STD/ISD)

Business no. (inc. STD/ISD)

Mobile no.

Fax no. (inc. STD/ISD)

E-mail address

Residential Address

☐ **Same as Postal Address above**

☐ **Different from Postal Address above – you MUST complete below**

No./Street

Suburb/Town/City

State/Territory

Postcode

Country (if outside Australia)

2. Applicant declaration

For the purposes allowed under superannuation law:

☐ I **agree to supply** my Tax File Number: - - to the Trustee.

OR

☐ I **do not wish to supply** my Tax File Number to the Trustee. I understand the consequences.

Signed

Date *(dd/mm/yyyy)* / /

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REASONS FOR SUPPLYING YOUR TAX FILE NUMBER (TFN) TO THE TRUSTEE

We are required to tell you the following things before you provide your tax file number (TFN) to the Trustee of the Scheme. Your TFN is confidential, and you should know the following things before you decide to provide it.

We can collect your tax file number under the Superannuation Industry (Supervision) Act 1993.

If you do provide your tax file number to us, we will use it only for legislative purposes. This includes finding or identifying your superannuation benefits where other information is insufficient, calculating tax on any superannuation benefits you may be entitled to, and providing information to the Commissioner of Taxation (amongst other things to enable the Commissioner of Taxation to assess any tax payable on superannuation contributions made by or for you). These legislative purposes may change in the future.

You are not compelled to provide your TFN and deciding not to quote your TFN is not an offence. However, if you do not provide your TFN you may pay more tax on your superannuation benefits than is required – any additional tax may be reclaimed through the tax assessment process if you subsequently provide your TFN. It may also be more difficult to locate or amalgamate your superannuation benefits in the future to pay you any benefits you are entitled to.

These consequences may also change in the future due to legislative change.

If you provide your tax file number to us, we may provide it to the trustee of another superannuation fund or to an RSA provider where the RSA provider or trustee is to receive your transferred benefits in the future. We will not pass on your tax file number to such a trustee or RSA provider if you tell us in writing that you do not want us to do that. We may also give it to the Commissioner of Taxation. Otherwise your tax file number will be treated as confidential.

As a result of recent changes to legislation arising out of the 2006 Federal Budget it is important that you consider giving us your TFN.

If you or your employer do not provide your TFN to the Scheme by the end of the financial year, then all of your concessional contributions will be taxed at the top marginal tax rate, plus the Medicare levy, if they exceed $1,000. For any accounts that begin after 1 July 2007, the $1,000 threshold does not apply. Furthermore, your Scheme will not be able to accept any non-concessional contributions from you if we do not have your TFN.

For this reason it is crucial that you consider providing your TFN to the Scheme, either directly or through your employer, as soon as possible (if you have not already done so). You should also check your Member Benefit Statement to ensure that your TFN is correctly recorded. For more information please see the PDS or contact Member Services.

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