

Step 3: Regular savings plan

Generations Personal Super

Regular contribution amount	Total			
Personal contribution*	\$			
	Components			
Employer contributions	\$	= \$	\$	\$
		Superannuation Guarantee contribution	Salary sacrifice	Employer additional
Spouse contribution	\$			
Total superannuation contribution	\$			

* If you intend to claim a deduction for personal superannuation contributions, you must provide the trustee valid notice of your intention to claim the deduction. The trustee is required to acknowledge receipt of the notice and you must have this acknowledgment before you claim the deduction.

Generations Investment Portfolio

Regular investment amount

Payment frequency

Fortnightly Monthly Quarterly

Date of payment (1st to 28th) OR Last day of the month

Step 4: Regular savings plan indexation

Indexation: Yes Type: CPI rate OR % Nominated percentage (up to 7.0%)

Step 5: Direct Debit Service Agreement

This agreement outlines our responsibilities as operator and your responsibilities with regard to direct debit requests.

Our responsibilities

- We will only deduct investments from your chosen account. We will confirm in writing the investment amount, and how often we have agreed to deduct it.
- We assure you that we will not disclose your bank details to anyone else, unless you have agreed in writing that we can, or unless the law requires or allows us to do this.
- We will debit your account on your nominated day of the month. If the payment date is a weekend or public holiday, we will debit your account on the next business day.
- We will give you at least 14 days notice when changes to the terms of this arrangement are made.

Your responsibilities

- Before sending us your account details, please check with your bank or financial institution that direct debit deductions are allowed on the account you have chosen.
- Please make sure that you have enough money in your account to cover payment of your premiums when due. Your bank or financial institution may charge a fee if the payment cannot be met.
- The financial institution may charge you a small fee for the direct debit arrangement. This will be shown in your financial institution account statement.

Changing your payment details

- You may cancel or change direct debit deductions at any time by completing a direct debit request form. Contact your financial adviser or call us on 1800 622 772.

Can we help?

- If you have any queries about your direct debit agreement please contact your financial adviser or call us on 1800 622 772.
- We undertake to respond to queries concerning disputed transactions within five working days of receipt of notification.

Step 6: Declaration and signature

I acknowledge that I have been provided with the direct debit service agreement which I have read and understood and agree to be bound by the above conditions under which Summit will use the direct debit facility to draw on my account as authorised on the attached direct debit request.

I am eligible to make this contribution to Generations Personal Super (for superannuation only).

<input type="text" value="X"/>	<input type="text"/>	<input type="text" value="/ /"/>
Client signature	Client name	Date