



### Step 3: Member signature

I request that all future superannuation contributions made on my behalf by my employer, be made to my chosen fund as set out in Step 2.

Signature

Date   /   /

### Employer payment methods

Employers must ensure that all contributions are made to the fund in accordance with SuperStream requirements – meaning both payments and associated data are sent in a standard electronic format prescribed by the Australian Taxation Office (ATO).

If you already have an employer plan with IOOF you may wish to consider using Transact (part of the IOOF Contribution Service), our SuperStream compliant online super contribution and administration system. This will allow you to send both contributions and remittance information electronically. Transact also offers a clearing house function you can use to make contributions for your employees with super plans outside of IOOF. Please contact the Transact help desk on 1800 125 566 for more information.

Alternatively, if you don't have an employer plan, you can still contribute to the fund for your employee's IOOF account and meet your SuperStream obligations by using a different clearing house, a payroll system that meets the SuperStream standard, or via the ATO Small Business Superannuation Clearing House (if you have fewer than 20 employees or if your annual aggregated turnover is less than \$10 million).

**Please visit our website ([www.ioof.com.au/superstream](http://www.ioof.com.au/superstream)) or contact ClientFirst on 1800 913 118 for further details.**



Creating financial independence since 1846

Please note: This letter can be provided to the fund you are transferring from to confirm that IOOF Portfolio Service Superannuation Fund is a complying superannuation fund.

To whom it may concern

# Certificate of compliance

IOOF Portfolio Service Superannuation Fund (SFN 3002/079/41), ABN 70 815 369 818, incorporating:

- Pursuit Select Personal Superannuation (USI IOF0083AU)
- Pursuit Core Personal Superannuation (USI IOF0086AU)
- Pursuit Focus Personal Superannuation (USI IOF0186AU)
- IOOF Portfolio Service Personal Superannuation (USI IOF0057AU)
- Financial Partnership Portfolio Service Personal Superannuation (USI IOF0069AU)
- Bendigo Financial Solutions Personal Superannuation (USI IOF0058AU)

We certify that:

- 1 IOOF Portfolio Service Superannuation Fund (Fund) is a complying superannuation fund within the meaning of the *Superannuation Industry (Supervision) Act 1993* (the Act)
- 2 the Trustee is IOOF Investment Management Limited (IIML) ABN 53 006 695 021, AFS Licence No. 230524
- 3 the Trustee of the Fund has not been directed by the Australian Prudential Regulation Authority to cease accepting contributions under Section 63 of the Act
- 4 the Trust Deed allows contributions and rollovers to be accepted by the Fund

Frank Lombardo  
Chief Operating Officer  
On behalf of IOOF Investment Management Limited

## Trustee

IOOF Investment Management Limited  
ABN 53 006 695 021  
AFS Licence No. 230524

## Registered Address

Level 6, 161 Collins Street, Melbourne, VIC 3000

## Client Services

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