

Superannuation standard choice form.

Form for participating employer – Executive.

June 2020

For use by employers when offering employees a choice of fund and by employees to advise their employer of their chosen fund. An employee may choose any eligible choice fund for the employer as a chosen fund for the employee.

Complete in pen using legible CAPITAL letters. Use X to mark boxes.

A Employee to complete.

Step 1. Choice of superannuation fund

I request all my future superannuation contributions to be paid to (select one option):

Hostplus, my employer's nominated superannuation fund.
Simply complete your personal details at step 2 and sign at step 4.

My own choice of APRA superannuation fund or self-managed super fund (SMSF). Complete your personal details at steps 2, complete and provide documentation outlined in step 3 and sign at step 4.

Step 2. Your personal details

Title

Mr Mrs Ms Dr Other

Date of birth

/ /

Given names

Surname

My Tax File Number is:

Employee identification number (if applicable):



**You do not have to quote your TFN but if you do not provide it, your contributions may be taxed at a higher rate.
Your TFN also helps you keep track of your super and allows you to make personal contributions to your fund.**

Step 3. Details of my chosen superannuation fund

Fund name

Fund address

Suburb

State

Postcode

Fund ABN (if applicable)

Your account name (if applicable)

Member number (if applicable)

Unique Superannuation Identifier (USI) (if applicable)

Fund phone number

If nominating your self-managed super fund (SMSF) please also provide:

Fund Electronic Service Address (ESA)

Fund Bank Account - BSB

Fund Bank Account - Account Number

Required documentation

- If your nominated fund is not an SMSF, you need to attach a letter from your fund stating that they are a complying fund and that they will accept contributions from your employer. Correct information about your super fund is needed for your employer to pay super contributions.
- If you are choosing an SMSF you need to attach a document confirming the SMSF is an ATO regulated super fund. You can locate and print a copy of the compliance status for your SMSF by searching using the ABN or fund name in the Super Fund Lookup service at superfundlookup.gov.au

If you are the trustee, or a director of the corporate trustee you can confirm that your SMSF will accept contributions from your employer by making the following declaration (place an x in the box below):

I am the trustee, or director of the corporate trustee of the SMSF and I declare that the SMSF will accept contributions from my employer.

If you are not the trustee, or a director of the corporate trustee of the SMSF, then you must attach a letter from the trustee confirming that the fund will accept contributions from your employer.

Your employer is not required to accept your choice of fund if you have not provided the appropriate documents.

I have attached the relevant documentation.

Step 4. Signature

Date

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If you have completed 'Section A', return this form to your employer and keep a copy for your own records. Do not send this form to the ATO or your superannuation fund.

B Employer to complete.

Your employer-nominated superannuation fund

If the employee does not choose a different superannuation fund, superannuation contributions will be paid to the following fund on behalf of this employee (unless they have previously chosen a different fund).

Give this form to your employee after you have completed 'Section B'.

Fund name

Fund phone number

Unique Superannuation Identifier (USI) (if applicable)

Fund website

Your details

Business name

ABN

Signature or full name

Date

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For your records

This section must be completed when the employee returns the form to you with a completed 'Section A'. In the two months after you receive the form from your employee you can make super contributions to either the fund you nominated or the fund the employee nominated. After the two-month period you must make payments to the fund chosen by the employee. Employers must keep the completed form for their own record for five years. Do not send it to the Australian Taxation Office, the employer's nominated fund or the employee's nominated fund.

Date valid choice is accepted

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Date you act on your employee's valid choice

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Compliance statement

Hostplus is a complying, resident and regulated super fund and can accept all types of super contributions within the meaning of the Superannuation Industry (Supervision) Act 1993 (SIS Act). Hostplus is a registrable superannuation entity and may be nominated as a default fund, as it meets the minimum statutory insurance cover requirements. The Trustee of Hostplus Superannuation Fund (ABN 68 657 495 890 is Host-Plus Pty Limited (ABN 79 008 634 704, AFSL 244392)

Privacy Statement

Hostplus does not collect this information; we provide this form as a means for employees to identify and provide necessary information to their employer. An employer is authorised to collect an employee's TFN under the Superannuation Industry (Supervision) Act 1993. It is not an offence for an employee not to quote their TFN. However, quoting a TFN reduces the risk of administrative errors and if the employee does not quote their TFN their contributions may be taxed at a higher rate. An employee can get more details regarding their privacy rights in relation to their superannuation by contacting their Superannuation Fund.



Hostplus contact details

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