

## Request to switch to an AMP SuperEdge deposit product

This application is for use by Australian-registered Self-Managed Superannuation Funds (SMSFs) to request to switch an existing deposit product to an AMP SuperEdge deposit product.

Please complete all applicable sections of this form.

Please print in CAPITAL LETTERS and place a cross  in any applicable boxes.

### 1. Important information

1. The SMSF trustee(s) must sign this form.
2. The effective date for all switches is the next business day after this request is processed by AMP Bank (generally within 48 hours of receipt). This means that any changes to interest rates, fees and charges and all other terms and conditions for the new product will apply from that effective date.

### 2. Existing account details

Existing AMP Bank account number is:

### 3. Switch FROM

Switch deposit product FROM:

- AMP Cash Manager     
  eASYCash Management Account     
  AMP Access  
 AMP Business Saver     
  Cash Management Account (including All-in-One)

### 4. Switch TO

Switch deposit product TO:

- AMP SuperEdge Cash Account<sup>1</sup>     
  AMP SuperEdge Pension Account<sup>2</sup>     
  AMP SuperEdge Saver Account<sup>3</sup>

- 1 Switches TO an AMP SuperEdge Cash Account are only permitted FROM an AMP Cash Manager, eASYCash Management Account, AMP Access or Cash Management Account. Please note that Visa Debit cards are not available on an AMP SuperEdge Cash Account. Any Visa Debit cards linked to the existing deposit product will be cancelled as part of a switch to an AMP SuperEdge Cash Account.
- 2 Switches TO an AMP SuperEdge Pension Account are only permitted FROM an AMP Cash Manager, eASYCash Management Account or Cash Management Account.
- 3 Switches TO an AMP SuperEdge Saver Account are only permitted FROM an AMP Business Saver Account.

### 5. Customer contact details

Account held in the name of

Contact name

Date of birth

Contact phone number

Residential address (must not be a PO Box)

Suburb

State

Postcode

Country of residence      If Other, please specify

- Australia   
  Other

## 6. Product features

### AMP SuperEdge Cash Account

This is a cash hub account for Trustees with an SMSF regulated by the ATO as an Australian complying fund. It is suited for SMSFs in the accumulation phase and helps you keep track of transactions between different accounts.

There are no monthly fees, and you can manage your account online, through the mobile app, or by phone banking.

**This product includes:**

- Easy online and phone banking
- The ability to link to a savings account held by your SMSF like a SuperEdge Saver Account or other external accounts
- Quick access to your funds.

**This product doesn't include:**

- A cheque book
- Bank@Post or digital wallet facilities

### AMP SuperEdge Pension Account

This is an everyday account for Trustees with an SMSF regulated by the ATO as an Australian complying fund, to receive pension distributions.

There are no monthly fees, and you can manage your account online, through the mobile app, or by phone banking. You can make unlimited transactions using a Visa Debit card, eftpos, BPAY®, Bank@Post and digital wallet facilities.

**This product includes:**

- The ability to link to a cash hub held by your SMSF like a SuperEdge Cash Account
- Mobile payment facilities.

**This product doesn't include:**

- A cheque book.

### AMP SuperEdge Saver Account

This is a high interest savings account for Trustees with an SMSF regulated by the ATO as an Australian complying fund. It helps you earn interest while still having access to your funds when you need them.

You can only access a SuperEdge Saver Account via a linked SMSF cash account. This can be a SuperEdge Cash Account or another external account. There are no monthly fees, and you can manage your account online, through the mobile app, or by phone banking.

**This product includes:**

- A competitive savings rate
- Easy online and phone banking
- The ability to link to a cash hub account held by your SMSF like a SuperEdge Cash Account or another external account
- Quick access to your savings.

**This product doesn't include:**

- A Visa Debit card, Bank@Post or digital wallet facilities
- No restriction on pay anyone amounts.

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## 7. Privacy Collection Statement

### Privacy Collection Notice

We collect the personal information of the SMSF trustee(s) named for the purpose of actioning the requested product change and used to establish and manage your new deposit product in relation to the administration of this product and your account.

We are required or authorised to collect this personal information under various laws including those relating to taxation and Anti-Money Laundering and Counter-Terrorism Financing Laws.

If you do not provide the required information, we will not be able to action your product change request.

We will only share your personal information:

- with authorised third parties on your account
- other members of the AMP group and external service providers that we need to deal with for the purposes described above
- as required by law or regulations with courts, tribunals or government agencies
- with persons or third parties authorised by you, or if required or permitted by law.

We may also disclose your name, residential address and/or date of birth to a credit reporting body (CRB) for the purposes of requesting the CRB to provide an assessment whether this personal information matches (in whole or in part) the personal information held by them. The CRB may prepare an assessment using this personal information, comparing this personal information with the personal information the CRB has on you and other individuals. The CRB may provide this assessment to us. If you don't consent to this, we may have to use other reasonable means of verifying your identity or decline to proceed.

Some external service providers we need to deal with can be located or host information outside Australia. A list of countries where these providers may be located can be obtained via our privacy policy. We take all reasonable steps to ensure that any information shared with external service providers is secured to protect your information.

### Marketing and other purposes

In addition to the purposes stated above we may use your personal information for marketing and research purposes. To opt out of direct marketing from AMP Bank, to obtain further information about how AMP handles your personal information or to request access to the personal information AMP holds about you, call 13 30 30 or write to: AMP Bank, Locked Bag 5059, PARRAMATTA NSW 2124 or email [info@ampbanking.com.au](mailto:info@ampbanking.com.au).

### Privacy Policy

Our Privacy Policy provides further information about how you can access or update your personal information or make a privacy-related complaint. This can be viewed online at [amp.com.au/privacy](http://amp.com.au/privacy) or contact us on 13 30 30 for a copy.

## 8. Declaration by Trustee(s)

By signing below the Trustee(s) declare, acknowledge and confirm that they:

1. Are making this request on behalf of an SMSF Trust that has been established in accordance with, and is currently fully compliant with the *Superannuation Industry (Supervision) Act 1993 (Cth) (SIS Act)*.
2. Have instructed AMP Bank to switch the existing deposit product to an AMP SuperEdge deposit product as indicated in sections 3 and 4.
3. Have considered the contents of the AMP SuperEdge Deposit Products Terms and Conditions, the Account Access and Operating Terms and Conditions, and the Deposit Products Fees and Charges Guide available at [amp.com.au](http://amp.com.au), and agree to be bound by these terms and conditions for the account(s) as set out in those documents.
4. Agree that all Access Methods (including but not limited to cheques, deposits, electronic payments and receipts, Visa Debit Cards, BankPhone, BankFax, BankNet and third party access) and their terms and conditions, if available on the new AMP SuperEdge deposit product, will apply to the existing account after it is switched to the new AMP SuperEdge deposit product, excepting where the terms and conditions of the AMP SuperEdge deposit product do not permit an Access Method.
5. Agree that if any Access Method is not permitted under the AMP SuperEdge Deposit Product Terms and Conditions, then that Access Method will be cancelled as part of the requested product switch.
6. Understand that AMP Bank may decline this application for any reason in its absolute discretion.

By submitting this application the Trustee(s) also acknowledge that AMP Bank may decide to delay or refuse any request or transaction (this includes preventing withdrawals from the account) if AMP Bank have not been able to verify a signatory's identity, or if AMP Bank believes in good faith that allowing the transaction may cause AMP Bank to commit an offence. AMP Bank does not accept responsibility for any such delay or refusal.

## 9. Signatures of applicants

### A. Sign here for requests by SMSFs with Individual Trustee(s).

Signature

X

Date

D D M M Y Y Y Y

Name (print in CAPITAL LETTERS)

Signature

X

Date

D D M M Y Y Y Y

Name (print in CAPITAL LETTERS)

Signature

X

Date

D D M M Y Y Y Y

Name (print in CAPITAL LETTERS)

Signature

X

Date

D D M M Y Y Y Y

Name (print in CAPITAL LETTERS)

### B. Sign here for requests by SMSFs with Corporate Trustee.

Executed pursuant to section 127 of the *Corporations Act 2001* (Cth).

Signature

X

Date

D D M M Y Y Y Y

Name (print in CAPITAL LETTERS)

Director/Sole Director & Company Secretary

Signature

X

Date

D D M M Y Y Y Y

Name (print in CAPITAL LETTERS)

Director/Company Secretary