

Enter "variable" fees and contributions in below - **all other fees are entered by Midwinter**

Fees/premiums	Platform 1 Details	Platform 2 Details
Exit Fees (% or \$)		
Contribution Fees (%)		
Review/Adviser Fees (% or \$)	\$_____pa	
Insurance Premiums (first yr premiums)	\$_____pa	\$_____pa
Contributions		
Super Guarantee (as % of income)	%_____pa	%_____pa
Non-concessional	\$_____pa	\$_____pa
Concessional (\$ or as % of income)	\$_____pa	\$_____pa

Any other comments about existing platforms? _____

Rollover Clarity – Recommended Details

Recommended Platform Name:			
Investment options	Amount	Fees for recommended platform	
		Entry Fees (% or \$)	%_____pa
		Contribution Fees (%)	%_____pa
		Review/Adviser Fees (% or \$)	%_____pa
		Insurance Premium (1 st yr premium)	%_____pa
		Contributions	
		Super Guarantee (as % of income)	%_____pa
		Non-concessional	\$_____pa
		Concessional (\$ or as % of income)	\$_____pa

Any other comments about recommended platform? _____

Rollover Clarity – Objectives and Features

Select which of the following objectives/features are relevant to the client/super switch

- | | | |
|-------------------------------------------------|---------------------------------------------------|-----------------------------------------------------|
| <input type="checkbox"/> Life insurance | <input type="checkbox"/> Number of investments | <input type="checkbox"/> Discount on home loans |
| <input type="checkbox"/> TPD Insurance | <input type="checkbox"/> Switching investments | <input type="checkbox"/> Discount on credit cards |
| <input type="checkbox"/> Salary Continuance | <input type="checkbox"/> Direct Share Access | <input type="checkbox"/> Discount general insurance |
| <input type="checkbox"/> Non-concessional conts | <input type="checkbox"/> Leveraged/Alternative | <input type="checkbox"/> Low initial investment |
| <input type="checkbox"/> Concessional conts | <input type="checkbox"/> Anti detriment payments | <input type="checkbox"/> Low regular investment |
| <input type="checkbox"/> Salary sacrifice | <input type="checkbox"/> CGT to pension phase | <input type="checkbox"/> Low withdrawal amount |
| <input type="checkbox"/> Spouse conts | <input type="checkbox"/> Statement frequency | <input type="checkbox"/> Auto-rebalancing |
| <input type="checkbox"/> Government co-conts | <input type="checkbox"/> Internet access | <input type="checkbox"/> Family linking/discounts |
| <input type="checkbox"/> Super splitting | <input type="checkbox"/> Internet transactions | <input type="checkbox"/> Treatment of tax (SMSF) |
| <input type="checkbox"/> General Rollovers | <input type="checkbox"/> Unit price frequency | |
| <input type="checkbox"/> Binding nominations | <input type="checkbox"/> Allocated pensions | |
| <input type="checkbox"/> Non-dependant benefits | <input type="checkbox"/> Term allocated pensions | |
| | <input type="checkbox"/> Transition to retirement | |

If you would like Midwinter's para-planning team to complete your statement of advice/insert, please fax this Super Switch request form to Midwinter on (02) 9233 4485.

(Contact Midwinter for pricing - you will be invoiced at the end of the month).

You can talk to Midwinter's friendly Help Desk on 1300 882 938.