



AAA Financial Intelligence Ltd ABN 23 093 616 445
 Australian Financial Services Licence 312478



Futureprom Pty Limited
 Authorised Representative of
 AAA Financial Intelligence Ltd
 1/300a Burns Bay Road Lane Cove 2066
 ABN 96 398 071 419
 Email info@futureprom.com.au
 Phone (20) 9428 1370
 Mob 0412 575 526

Date: _____

REQUEST FOR SUPERANNUATION INFORMATION

I/we _____ hereby authorise

Futureprom Pty Ltd, Authorised Representative (no. **258204**) of AAA Financial Intelligence Ltd.
 to obtain information in relation to my/our personal details

Please provide my adviser with the relevant information requested on my behalf.

This request is valid until revoked in writing by myself or my adviser.

Superannuation Fund Provider: _____

Fax Number: _____ **Date of Request:** _____

Client Name: _____ **Member Number:** _____

	Fund Name
Account Balance:	
Date Joined Plan:	
Date Commenced for Taxation purposes:	
Contributions being paid Employer SGC:	
Salary Sacrifice:	
Member after Tax:	
MEMBER ACCOUNT FEES	
Investment Fees (MER's):	
Exit Fee:	
Switching fee:	
Contribution Fee:	
Any Fee Rebates applicable/available:	

INVESTMENTS	
Currently investment holdings for client:	
Investment Buy/Sell Spread:	
What Investment Options are available?	
What is the default investment option?	
Are investments priced daily/weekly:	
Are investment holdings smoothed to provide an annual rate of return or unitised?	
What were the last 5 years declared interest rates of return?	
What is the interim interest rate (if applicable)?	
INSURANCE BENEFITS	
How much is my client insured for?	
What are the costs for insurance?	
What are the insurance options?	
What is the default insurance level and cost?	
Are there any other benefits of being a member of the fund?	

Client Name (Please Print)

Client Name (Please Print)

Client Signature

Client Signature

Adviser Signature

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