e 💥 pand.

Frequently asked questions for new eXpand members

Q. Where do I find my USI (Unique Superannuation Identifier) for eXpand Super?

A. The USI for eXpand Super is: **SMF0126AU**. This can also be found in our <u>full list of USI numbers</u>.

Q. How do I make personal contributions?

- A. You can make personal contributions either by BPAY[®] or Direct Debit:
 - For BPAY: Log in to your account to access BPAY payment details.
 - For **Direct Debit**: Use our <u>Direct Debit Form</u> to arrange debit payments.

Q. What is a Standing Instruction?

A. Standing Instructions are instructions you give us that tell us how you want your contributions invested in your account on an **ongoing basis**. They are "standing" instructions because they remain active until you tell us otherwise.

Q. How do I update my Binding Death Nomination?

- A. Updating your Binding Death Nomination is simple. Just do the following:
 - 1 Log in to your account;
 - 2 click the "Beneficiary" tab; and
 - **3** follow the prompts.

Alternatively, you can complete our <u>Binding Death</u> <u>Nomination form</u>.

We recommend that you speak with your financial adviser when considering what death nomination option suits your personal circumstances.

Q. How does my employer contribute to my Super?

A. You will need to provide your employer with our <u>Choice of Fund form and Certificate of Compliance</u>.

Q. Can I combine my other Super accounts into eXpand?

A. Yes, clients can request to consolidate their accounts through <u>MyGov</u>.

Alternatively, you can complete our <u>Request to</u> <u>Transfer form</u> to consolidate your account funds.

Q. Can I contribute funds during the transaction freeze period?

A. You can contribute funds after the **24th of May**. The funds contributed will remain in cash and will not be invested unless we receive your **buy request** after the migration.

Q. Will your BPAY details change?

A. Yes, our BPAY details will change. This is because both our USI (Unique Superannuation Identifier) will change and your account number will change. The new BPAY details will be included in your Welcome Pack.

More information

Please speak to your financial adviser or contact ClientFirst on 1800 517 124.

® Registered to BPAY Pty Ltd ABN 69 079 137 518

This document has been prepared by IOOF Investment Management Limited (IIML) ABN 53 006 695 021, AFSL No. 230524 as Trustee of the IOOF Portfolio Service Superannuation Fund ABN 70 815 369 818 and IOOF Investment Services Ltd (IISL) ABN 80 007 350 405, AFSL No. 230703 as Service Operator of the applicable Investor Directed Portfolio Service. IIML and IISL are part of the IOOF Group of companies, consisting of IOOF Holdings Limited ABN 49 100 103 722 and its related bodies corporate. This document contains general advice only. It does not take into account your financial circumstances, needs or objectives. Before making any decisions based on this document, you should assess your own circumstances or seek advice from a financial adviser. You should obtain and consider a copy of the relevant formal offer document available from us or your financial adviser, before you acquire a financial product. The information in this document has been given in good faith and has been prepared based on information that is believed to be accurate and reliable at the time of publication.