

Family Discount Form



This form can be used by family groups to receive a discount on their administration fees when two or more family members hold an account within the Fund. Eligible members will receive a 0.10% administration fee discount on the first \$500,000 of their account balance. This form should not be submitted until all Applications have been received or accompany this form. In regards to this form, it is important to note:

- This discount will only apply to immediate family (spouse, parents and children of the same family)
- This form will replace any existing discounts on the accounts listed below.
- Family discount does not apply to the portion of a member's account invested in the AMG MySuper option.
- The Administration fee discount will commence on the next available fee run once the Administrator receives this completed form.
- The Trustee has final discretion with regards to determining eligibility for the family discount.

Section 1: Member details

Account name: (Primary account holder)

Account number: Date of birth:

Account name: Date of birth:

Account number: Relationship:

Account name: Date of birth:

Account number: Relationship:

Account name: Date of birth:

Account number: Relationship:

Account name: Date of birth:

Account number: Relationship:

Section 2: Adviser acknowledgement

I acknowledge that the above members meet the relationship and/or related entities criteria.

Adviser's name:

Adviser's signature: Date: