

Application for Fund Registration

AIST is an independent, not-for-profit, member-based organisation.

Our members are Trustee Directors and fund staff of corporate, public sector and industry super funds.

We are a Registered Training Organisation and offer a range of services including, Professional Development, Events, Compliance services and member support. We advocate on behalf of our members to relevant stakeholders.

Our services are designed to support members in their endeavour to improve superannuation services and build a better retirement for all Australians.

Mission

AIST's mission is to:

- Promote the values of the representative superannuation industry;
- Promote the benefits of representative Trusteeship in providing a viable and equitable retirement system in Australia;
- Provide support, encouragement, education and training and other resources for those involved in the representative superannuation industry.

AIST realises its mission through the provision of a range of services and activities. Information is available on the AIST website www.aist.asn.au

Eligibility for Fund Registration and AIST membership as a fund representative

Registration with AIST is exclusive to:

- Superannuation Funds that are managed by trustee (or other arrangements) within the representative superannuation industry;

Membership of AIST as nominated representatives of a Registered Fund is exclusive to:

- Current directors, employees and/or officers of the fund, providing the fund is eligible for registration.

Representative superannuation fund

A representative fund is a regulated superannuation fund that:

- Is governed by a trustee with a board of Directors that includes representatives of members and employers or is otherwise adequately representative of both employees and employers;
- Is managed solely for the benefit of its members; and
- Holds the relevant licences required to be a regulated superannuation fund.

AIST benefits, entitlements and services

The benefits AIST offers registered funds and members, their entitlements and the range of services available are explained on our website and can be downloaded from www.aist@asn.au. Specific services are detailed in brochures that can also be downloaded from our website.

How to register

1. Complete the Fund Registration Form
2. Nominate your representatives who will be covered for AIST membership by your Fund Registration; you must nominate at least one representative
3. Sign the Declaration and Warranties incorporated in the registration form
4. Send the completed Fund Registration Form accompanied by the total fee payable to:
The Membership Services Manager
AIST
Ground Floor, 215 Spring Street
MELBOURNE VIC 3000

Constitution

In accordance with its constitution:

- AIST may only accept registration from funds that:
 - meet the eligibility rule detailed here and in the Constitution; and
 - have completed all the registration steps detailed above.
- AIST may only grant membership to representatives nominated by funds if:
 - they meet the eligibility rule detailed here and in the Constitution; and
 - all details requested in the 'Nomination of Fund Representatives' section of this form are provided.

The AIST Constitution is available on our website, and is distributed with the papers in advance of the Annual General Meetings.

Privacy

AIST is committed to protecting the privacy of individuals and complies with the *Privacy Act 1988* and the National Privacy Principles. Compliance is assured through staff training and internal auditing of relevant procedures, which extend to the collection of information to register people for events, exhibitions and conferences, including any personal information required to arrange travel and accommodation to such events or for the purposes required to administer their AIST membership.

The Privacy Statement included on the 'Nomination of Fund Representatives' section of the Fund Registration form is a précis of the AIST Privacy Policy.

The full policy can be accessed on our website www.aist.asn.au

Fund Registration Fees

The fee payable depends on the number of representatives you nominate as AIST members under your registration. Representatives may be directors, employees and / or officers of the trustee.

You must nominate a minimum of one representative.

The fee has two components;

1. The Registration Fee which provides the fund with the benefits detailed on AIST's website and new benefits that AIST offers at any time in the future while it remains a Registered Fund; and;
2. A representative fee, which is an amount payable for each representative you nominate as an AIST member.
 - The registration fee is dependant on the number of representatives the fund nominates.
 - There are a number of complimentary memberships for nominated representatives. The number is dependant on the Registration Fee payable.
 - The table below details the total fee payable in relation to the total number of fund representatives nominated.

The fee per representative is \$500 excluding complimentary representative(s) unless the fund nominates more than 30 representatives.

Number of representatives	Registration fee \$ p.a. +GST	No of complimentary representatives	Total fee payable \$ + GST
1 to 5 Representatives	1,500	One	1 Rep 1,500 +gst
			2 Reps 2,000 +gst
			3 Reps 2,500 +gst
			4 Reps 3,000 +gst
			5 Reps 3,500 +gst
6 to 10 Representatives	4,800	Two	6 Reps 6,800 +gst
			7 Reps 7,300 +gst
			8 Reps 7,800 +gst
			9 Reps 8,300 +gst
			10 Reps 8,800 +gst
11 to 15 Representatives	5,500	Two	11 Reps 10,00 +gst
			12 Reps 10,500 +gst
			13 Reps 11,000 +gst
			14 Reps 11,500 +gst
			15 Reps 12,000 +gst
16 to 20 Representatives	6,800	Two	16 Reps 13,800 +gst
			17 Reps 14,300 +gst
			18 Reps 14,800 +gst
			19 Reps 15,300 +gst
			20 Reps 15,800 +gst
21 to 30 Representatives	6,800		21 Reps 16,100 +gst
			22 Reps 16,400 +gst
			23 Reps 16,700 +gst
			24 Reps 17,000 +gst
			25 Reps 17,300 +gst
			26 Reps 17,600 +gst
			27 Reps 17,900 +gst
			28 Reps 18,200 +gst
			29 Reps 18,500 +gst
30 Reps 18,800 +gst			
31+ Representatives	POA	4	

Fund Registration Form

FUND DETAILS

Fund Name					
Mailing Address					
	City/Suburb		State		Postcode
Trustee Company					
AFSL Number			RSE Licensee number		
Registered address					
(If different to above)					
	City/Suburb		State		Postcode
Person authorised to register the fund					
Name					
Position/Title					
Contact phone	()		(business hours)		
Email address					
Number of Fund Representatives nominated:		(Please complete details over the page)		TOTAL FEE PAYABLE	\$

DECLARATION AND WARRANTIES

I have read and understand the information provided in this application and on the AIST website and declare that:

- I am authorised to apply for AIST registration of the fund named on this form and make all undertakings required on this form and by the AIST Constitution;
- The fund named on this form is a Regulated Superannuation Fund within the meaning of the *SIS Act (1993)* and; the fund is a representative superannuation fund as defined in this application and the Constitution;
- In the event of AIST winding up, the fund named on this form will cover its nominated representatives' obligation under the AIST Constitution to contribute a maximum of \$10 should the circumstances so require;
- All representatives nominated on this form meet the eligibility requirements described in this application and; the fund will notify the AIST as soon as practicable should any representative nominated on this form cease to be a director, employee or officer (other than a director) of the trustee;

- I understand that the AIST Directors may at any time determine the rules that are to apply in respect of registration fees, including in circumstances where a Registered Fund ceases its participation part way through the period covered by its registration fee;
- I agree to pay the participation fee.

Signature
X
Name (please print)
Title
Date / /

Method of payment Cheque Debit my credit card Master Card Visa Amex EFT (See below)

Cardholder's name: _____

Card Number _____ Expiry date _____ / _____

Signature X _____

EFT Payment: Please email your remittance advice to remittance@aist.asn.au
Account Name: AIST Business Management

BSB: 083-004
Account Number: 86-569-8137
Bank: National Australia Bank

Nomination of Fund Representatives

REPRESENTATIVES' DETAILS

<i>Name</i>	<i>Position</i> <i>Director, staff or Officer</i>	<i>Email address</i>	<i>Contact phone Number</i>	<i>Mailing address</i>

Please use the Representatives Details [continued] page inserted in this application to complete your nominations, if required.

Membership

The representatives nominated on this form will be admitted to AIST membership and have access to members' benefits and entitlements immediately this Application for Fund Registration is accepted and processed by AIST, until such time as their membership of AIST ceases; and are bound by the AIST Constitution.

Cessation of membership

A member nominated by a Registered Fund ceases to be a member if AIST receives a notice from the fund stating that the member is no longer a representative of the fund, and is not readmitted as a representative within three months; or if AIST receives a written resignation from the member; the member is convicted of an indictable offence; the member becomes of unsound mind or becomes liable to be dealt with in any way by the law relating to mental health; or if the member dies.

Privacy Statement

AIST is committed to protecting the privacy of individuals and complies with the Privacy Act 1988 and the National Privacy Principles. Compliance is assured through staff training and internal auditing of procedures. The information AIST collects about individuals is used solely to administer their membership, keep them informed of industry developments, ensure their access to the benefits and entitlements of AIST membership and to facilitate participation in AIST activities. It is not disclosed for any other purpose unless required by law.

Nomination of Fund Representatives

REPRESENTATIVES' DETAILS - CONTINUED

<i>Name</i>	<i>Position</i> <i>Director, staff or Officer</i>	<i>Email address</i>	<i>Contact phone Number</i>	<i>Mailing address</i>

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