

AON MASTER TRUST ADVISER INSTRUCTIONS



The AML/CTF Act has made identification requirements a lot stricter. The following table shows the circumstances where an authorised adviser can (and can't) instruct Aon Master Trust on behalf of their client.

Item	Personal Super	Corporate Super	Pension
Investment switch	Yes	Yes	Yes
Change of member details	Yes	Yes	Yes
Change of name or date of birth	No	No	No
Beneficiary nomination	Yes	Yes	Yes
Binding death benefit nomination	No	No	No
Change of bank details	N/A	N/A	Yes*
Direct debit bank details	No	N/A	N/A
Change of pension amount/ frequency	N/A	N/A	Yes
TFN notification	Yes	Yes	Yes
Insurance cancellation	Yes	Yes	N/A
Insurance application	Yes	Yes	N/A
Benefit payment to external funds	No	No	No
Internal transfers	Yes	Yes	Yes
New entrant	Yes	Yes	No

Yes means we can accept instructions from the member's authorised adviser and we can accept forms to come through via fax or scanned to an email.
No means we need the member's signature and the original form.

We can accept copies of forms/documents with the exception of:

- ↘ Identification documents required by the AML/CTF Act (note that these are required once only unless otherwise specified by AML/CTF Law — we do not require a new ID each time a member applies for a payment)
- ↘ Personal statements
- ↘ Benefit payment requests for cash payments or transfers to external funds

* Pensioners can instruct their adviser to update their bank details provided the adviser sends the relevant email trail from the member.

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