

2024/25 The Association of Superannuation Funds of Australia Limited organisational membership application form

**To apply for membership of ASFA, please complete this form and email it to:
ASFA Membership, membership@superannuation.asn.au**

If you require any assistance, please call ASFA Membership on (02) 9264 9300 (or 1800 812 798, if outside Sydney).

Section 1: Organisational name and member categories

Organisation name: _____

Organisational members may apply for membership in one of the following categories (*Please tick appropriate box*).
If your organisation operates in more than one category, please speak to an ASFA Membership team member (see details above) to help you determine your member category.

Corporate fund **Industry fund** **Public sector fund** **Retail fund** **Service provider***

*Service providers are organisations that provide goods or services to the superannuation industry, including custodians, administration providers, merchant banks, investment managers, life offices, accountancy and legal firms, actuaries and other financial services providers. This includes service provider employee funds.

Please note that all applications are subject to final ASFA Management approval.

Section 2: Membership fee scales and rates 2024/25

We deliver value to members by: providing cross-sector collaboration, research and professional development to continuously improve the system, in order to optimise retirement outcomes, for the benefit of all Australians.

ASFA organisational member fees are calculated based on whether your organisation is a fund or a service provider.

As a member fund your fee will be constructed on the basis of publicly disclosed funds under management and member information.

For service providers:

Please complete the following statements so ASFA can calculate the appropriate fee.

- The most recent annual turnover* is \$_____.
- The number of employees working in superannuation* is _____.
- Please tick the appropriate business category listed below:

Fund/Investment Manager **Legal Services** **Human Resources** **Insurer/Bank** **Accountancy Services**

Software/Project Management Solutions **Actuarial/Audit/Tax Consulting** **Investment/Financial Research/Ratings** **Government/Education** **Financial Advisory/Consultant**

Superannuation Services **Media Company** **Administrators** **Other:** _____

*This information will not be disclosed. If you are part of a global company, please provide the information for the Australian subsidiary only.

Section 3: Key contact information

We ask all member organisations to choose a Member Liaison (ML) and a Nominated Representative (NR).

The Member Liaison (ML) plays a pivotal role in helping make the most of ASFA membership, acting as the gateway to your organisation. ASFA sends many of its communications through MLs. We ask MLs to disseminate ASFA information through your internal channels to all the relevant people in your organisation. They will also be responsible for maintaining membership details and completing the annual membership renewal process.

The Nominated Representative (NR) will receive information regarding the AGM and Board elections. Under the ASFA constitution the NR holds the voting rights for your organisation in elections and at general meetings, or has the right to assign a proxy.

You may nominate the same person for both roles.

Please complete the following details for the ML:

Preferred prefix (Mr, Ms, Mrs, Miss, Dr, Other) _____ First name _____

Middle initial _____ Surname _____

Post nominals (eg. FASFA, AASFA) _____

Title/position _____

Organisation name _____

Organisation ABN _____

Mobile number _____ Work phone number () _____

Email address _____

(member's business email required for web access)

Business street address _____

State _____ Postcode _____ Country _____

Postal address (if different from above) _____

State _____ Postcode _____ Country _____

Please complete the following details for the NR (if NR is the same person as the ML please write 'as above'):

Prefix (Mr, Ms, Mrs, Miss, Dr, Other) _____ First name _____

Middle initial _____ Surname _____

Post nominals (eg. FASFA, AASFA) _____

Title/position _____

Organisation name _____

Organisation ABN _____

Mobile number _____ Work phone number () _____

Email address _____

(member's business email required for web access)

Business street address _____

State _____ Postcode _____ Country _____

Postal address (if different from above) _____

State _____ Postcode _____ Country _____

Note: All employees of an organisational member of ASFA are entitled to member benefits including password protected web access and an online subscription to Superfunds magazine. Once membership is approved, login details for web access will be communicated by email.

Section 4: Organisation website hyperlink

Organisational members are entitled to have their company website address listed as a hyperlink in the 'Member Directory' section of the ASFA website. Please provide the website address on the line below.

I do not wish for my organisation to appear on the website.

Section 5: Giving members a say

As an ASFA member, you can help drive ASFA's policy, advocacy and research activities by joining our various committees, councils, working groups and discussion groups. With over 20 national or state-based groups to choose from, there are many opportunities to help shape the industry, join the debate and network with colleagues across all industry sectors.

Please tick the groups of most interest:

ASFA Policy Forums

- | | | |
|---|--|--|
| <input type="checkbox"/> Policy Advisory Panel | <input type="checkbox"/> Tax Specialist Advisory Committee | <input type="checkbox"/> Consumer Advisory Panel Steering Group |
| <input type="checkbox"/> Government Relations and Policy Advisory Forum | <input type="checkbox"/> Chief Investment Officers Forum | <input type="checkbox"/> Common Service Standards Steering Group |
| <input type="checkbox"/> Super System Design Policy Council | <input type="checkbox"/> Cyber Resilience Forum | |

ASFA Issue Specific Working Groups

- | | | |
|---|--|--|
| <input type="checkbox"/> Advice in Super | <input type="checkbox"/> Payday Super | <input type="checkbox"/> Financial Accountability Regime (FAR) |
| <input type="checkbox"/> Environmental, Social and Governance (ESG) | <input type="checkbox"/> Objective of Super | <input type="checkbox"/> Family Law Superannuation Splitting |
| <input type="checkbox"/> Successor Fund Transfers (SFT) | <input type="checkbox"/> Strategic Planning and Member Outcomes - APRA SPS 515 | <input type="checkbox"/> Common Service Standards – Insurance claims |
| <input type="checkbox"/> Super Tax Concessions | <input type="checkbox"/> Operational Risk Management | <input type="checkbox"/> Common Service Standards – Death Benefits |
| <input type="checkbox"/> Super Rollovers and Fraud Risk | | |

ASFA privacy notice

Your privacy

Collection and use of personal information

ASFA collects, holds and uses personal information about you that is reasonably necessary for, or directly related to, our functions or activities as set out on the ASFA website and in our privacy policy (see below).

Disclosure of personal information

We will only disclose your personal information where reasonably necessary for, or directly related to, provision of ASFA functions or activities as set out on the ASFA website and in our privacy policy. In the course of normal business we may provide personal information to service providers including, for example, organisations that assist us in delivering training services, conferences, seminars and other events to you, and mailing houses and market research companies specifically to undertake ASFA business. If you register for an ASFA event, we may provide personal information about you to sponsors of the events, unless you ask us not to do so.

Our privacy policy

Our privacy policy sets out our approach to the management of personal information. Subject to the *Privacy Act 1998* (Cth), you can have access to and seek correction of your personal information. Our privacy policy contains information about how you can do this. Our privacy policy also contains information about how you can make a complaint about a breach of privacy.

Privacy policy: www.superannuation.asn.au/site-tools/privacy-policy