



smartMonday

August 2021

Intuit

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A man with a beard, wearing a white hard hat and an orange safety vest over a dark blue shirt, is shown in profile, looking towards the left. The background is a blurred industrial or construction site. A large green diagonal shape is overlaid on the left side of the image, containing the text.

The nuts & bolts of **smartMonday**

Aon & smartMonday Global Leader - Local Partner



RISK

\$120B of risk premium placed annually.



RETIREMENT

\$3.3T in assets under advisements.

We touch
\$6 trillion of \$31 trillion



in total pension assets



EXPERIENCE

EST.
1990



ASSETS

\$5.2B



MEMBERS

85,000

**smartMonday
Australian
investment
team**

- ✓ 9 assets allocation specialists
- ✓ 50+ investment risk modelers
- ✓ 33 portfolio managers
- ✓ 148 manager researchers



What to consider

Investments



Fees



Insurance



Investment Options

01

MYSUPER

An investment strategy you'll be automatically enrolled into if you prefer a less complicated super.

Our "Glidepath" automatically seeks to reduce investment risk as members move towards retirement.

02

CHOICE

Choose how your money is invested.

- Variety of sector and pre-mixed options
- Actively and passively managed options





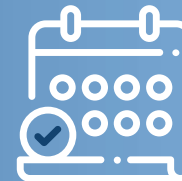
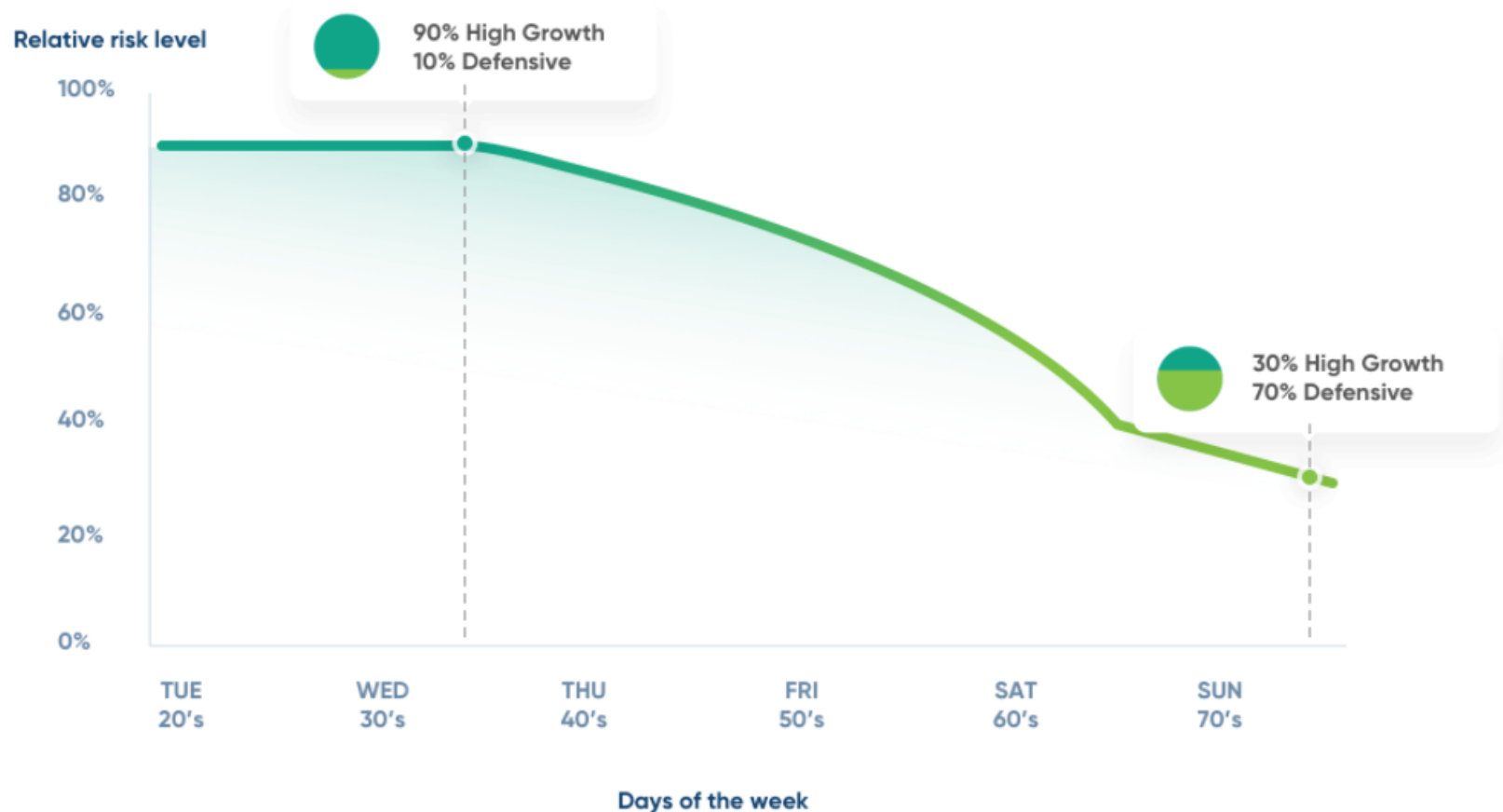
PRE-MIXED

Aon MySuper
High Growth – Index
High Growth – Active
Growth – Index
Growth – Active
Balanced Growth – Index
Balanced Growth – Active
Moderate – Index
Moderate – Active
Defensive – Index
Defensive – Active

SECTOR

Australian Shares – Index
Australian Shares – Diversified
Australian Shares – Core
Australian Shares – Opportunities
International Shares – Index
International Shares – Index
(\$A hedged)
International Shares – Diversified
International Shares – Core
International Shares – Core
(\$A hedged)
Alternatives – Diversified
Property – Australian Index
Property – Diversified
Property – Globally Listed
(\$A hedged)
Fixed Interest – Australian Index
Fixed Interest – Australian
Fixed Interest – International Index (\$A
hedged)
Fixed Interest – International
Fixed Interest – Diversified
Cash

Aon MySuper Lifecycle Investment Strategy



Aon MySuper

My Super (lifecycle) **Fee Structure**

(per annum)

	Base Fee	Standard \$50k Balance	Pre 1 June \$50k Balance
Member Fee	\$72.00	\$72.00	\$94.56
Asset Administration Fee	Standard fee 0.44%	\$220.00	\$265.00
Investment Fee	0.36% (Range 0.24% to 0.73%*)	\$180.00	\$120.00
Indirect Cost Ratio	Up to 0.00% (Range 0 to 0.33%)	\$0	\$20
		\$472.00	\$499.56

Choice Fee Structure (per annum)

	New Base Fee	1 June \$50k Balance	Pre 1 June \$50k Balance
Member Fee	\$72.00	\$72.00	\$94.56
Asset Administration Fee	Standard 0.44%	\$220.00	\$250.00
Investment Fee	0.38%^ (Range 0.24% to 0.73%*)	\$190.00^	\$265.00^
Indirect Cost Ratio	0.03%^ (Range 0.00% to 0.33%)	\$15^	\$15^
		\$497.00^	\$624.56

^ Balanced Growth Index fee

Intuit Employees Insurance

Upon joining the plan, employees receive:

DEATH & TPD COVER

The greater of:

> 4 x Salary

Or

> Minimum Level Default Cover
(MLDC)

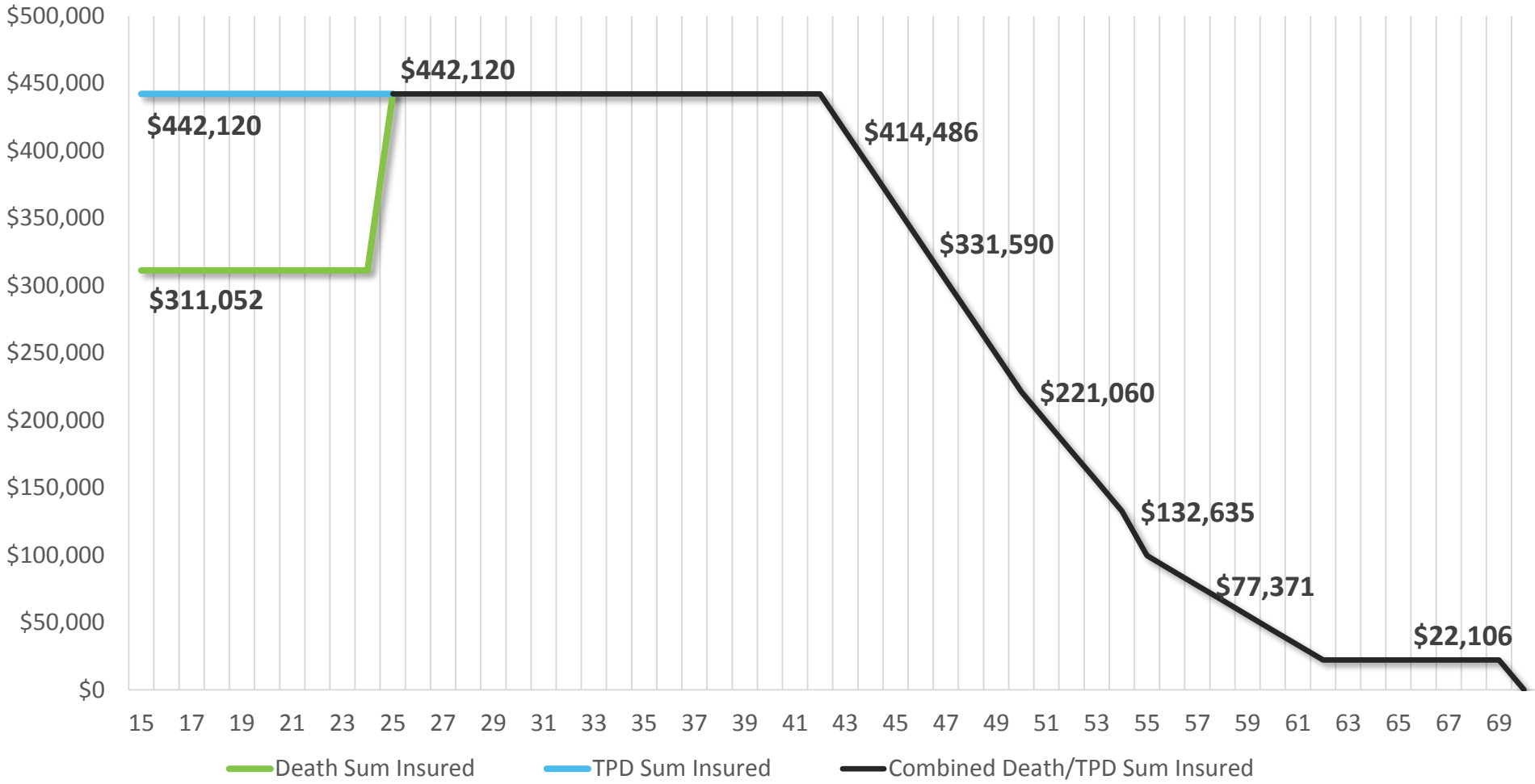
Premiums paid by your
employer, Intuit, as an employee
benefit

INCOME PROTECTION

Is held outside of Super and
provided as an employee benefit
by Intuit. Please contact HR for
any information regarding your
Income Protection



Insurance Cover **Life and TPD**



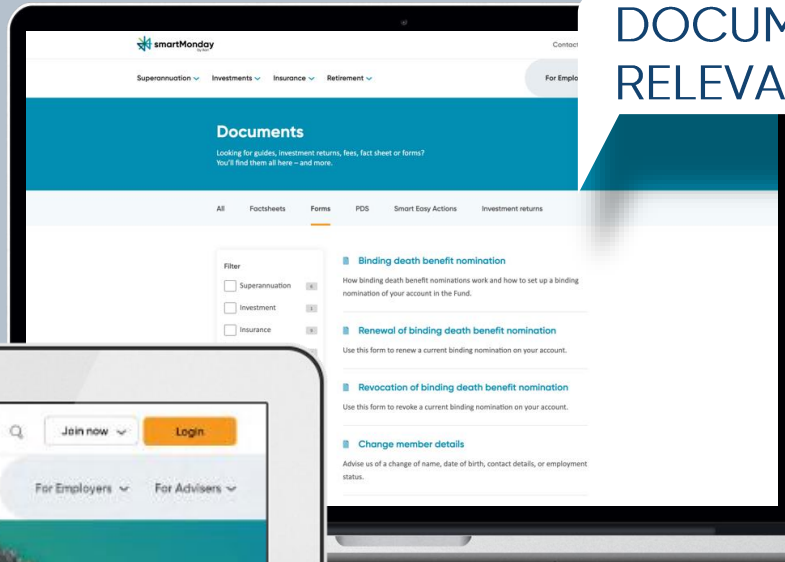
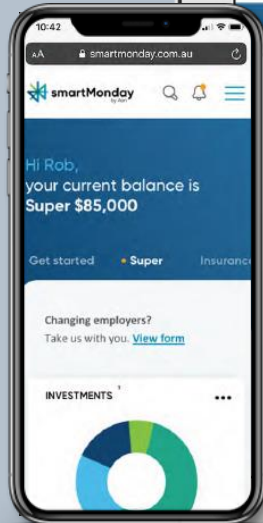
Source: smartMonday PRIME PDS Insurance Reference Guide 1 July 2020

Your Online Experience

NEW MEMBER PORTAL

DOCUMENTS RELEVANT TO YOU

SMART, EASY, ACTIONS



@smartMondayau



WeCare

Member support through **WeCare**

1800 828 736

- Emergency telephone counselling and grief support available 24/7
- Live conference translation service in approximately 180 languages.
- All other WeCare services are available 9.00am to 5.00pm in all Australian time zones.



Counselling



Funeral assistance



Legal + Tax



Home + Care



smartCoach Pathway

- ✓ Helping you plan for a great weekend
- ✓ Understanding if you're on track to meet your retirement goals
- ✓ Sharing superannuation knowledge and experience in a 1 on 1 session
- ✓ Providing flexible and ongoing support to suit members' personal requirements



Take advantage of the smartCoach service today

Meet the smartCoach team



1300 262 241



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smartCoach
is available
at no
additional
cost

Contact Details

For any questions or to book in a one on one
conversation
with a smartCoach

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