

Plum Super

Significant Event Notices issued by NULIS Nominees (Australia) Limited as Trustee of the MLC Super Fund

Notice date	Nature of event or change	Impact of the change
01 July 2025	Annual Statement Brochure 2025	<p>The brochure was attached to all 2025 Annual Statements for members of Plum Corporate Plans, Plum Personal Plan, Plum Retirement Income, NAB Group Super Fund and had the following content:</p> <ul style="list-style-type: none">• Regulatory changes<ul style="list-style-type: none">◦ Transfer balance cap increase◦ Term Allocated Pension commutation changes• Investment updates<ul style="list-style-type: none">◦ MLC Flexible Moderate, MLC Flexible Assertive closures◦ Changes for some investment options to Asset Allocations, Investment objective, Standard Risk Measure and Minimum suggested time to invest◦ MLC Socially Responsible Growth management changes• General updates<ul style="list-style-type: none">◦ Changes to beneficiary nominations◦ Tax credit changes◦ Mobile phone number now required for logging in online◦ Removal of cheque payments from 30 September 2025◦ MLC superannuation & pension operations administered in India◦ Changes to fees and costs◦ Buy-sell spread changes• Insurance updates<ul style="list-style-type: none">◦ MLC Life Insurance to trade as Acenda
30 June 2025	Superannuation update	<p>To notify impacted Plum defined benefit members about an update to their notional taxed contributions effective 1 July 2025</p>
19 June 2025	Insurance update	<p>To notify members in the Gold Fields Superannuation Plan about the changes to group life insurance premium rates and a change to the Future Service calculation.</p> <p>These changes are effective from 1 August 2025.</p>
19 June 2025	Insurance update	<p>To notify members in the Philip Morris Superannuation Plan and Boral Super about the changes to group life and group salary continuance insurance premium rates and some changes to terms and conditions.</p> <p>These changes are effective from 1 August 2025.</p>
19 June 2025	Insurance update	<p>To notify members in the Shell Australia Superannuation Plan about the introduction of the insurance fee, changes to group life and group salary continuance insurance premium rates and some changes to terms and conditions.</p> <p>These changes are effective from 1 August 2025.</p>
22 May 2025	Insurance update	<p>To notify members in the Opal and Australian Paper Superannuation Plan about the introduction of the insurance fee, changes to group life and group salary continuance insurance premium rates and some changes to terms and conditions.</p> <p>These changes are effective from 1 July 2025.</p>

20 May 2025	Insurance update	<p>To notify members in JLL Super of a change of insurer, the introduction of the insurance fee, changes to group life and group salary continuance insurance premium rates and some changes to terms and conditions.</p> <p>These changes are effective from 1 July 2025.</p>
20 May 2025	Insurance update	<p>To notify members in the Mars Australia Retirement Plan that insurance costs for standard benefits are reducing on 1 July 2025. As a result, members will use less of their concessional contributions cap.</p>
20 May 2025	Plan change	<p>To notify members in the TWE Superannuation Plan of a fee change.</p>
28 April 2025	Investment menu changes	<p>To advise members of Plum Super with holdings in MLC Flexible Moderate and MLC Flexible Assertive that these investment options will be terminating.</p>
28 April 2025	Tax deduction	<p>To notify members of Plum of changes to how we pass back the benefit of tax deductions, effective 1 July 2025.</p>
17 April 2025	Insurance update	<p>To notified impacted members in the West Australian Newspapers Superannuation Plan about a reduction of the insurance fee, changes to group life and group salary continuance insurance premium rates and some changes to terms and conditions for casual employees.</p> <p>These changes are effective from 1 June 2025.</p>
17 April 2025	Insurance update	<p>To notified impacted members in the Amcor Super Plan and the Tabcorp Group Superannuation Plan about the introduction of the insurance fee, changes to group life and group salary continuance insurance premium rates and some changes to terms and conditions.</p> <p>These changes are effective from 1 June 2025.</p>
17 April 2025	Insurance update	<p>To notified impacted members in the ABB Australia Superannuation Plan about a reduction of the insurance fee, changes to group life and group salary continuance insurance premium rates and some changes to terms and conditions.</p> <p>These changes are effective from 1 June 2025.</p>
14 April 2025	Plan Management Fee Reduction	<p>To notify members in Spicers Superannuation Plan about a reduction in the Plan Management fee of certain accumulation classes from 0.13% to 0.06% per annum, effective 1 May 2025.</p>
24 March 2025	Plan change	<p>To notify impacted members in the Hanesbrands Superannuation Plan of a change to how premiums for standard Death and Total and Permanent Disablement insurance cover are paid.</p> <p>This is effective from 1 May 2025.</p>
21 March 2025	Investment Fee update	<p>To notify impacted members of Plum employer plans of investment fee rebate reductions effective 1 May 2025.</p>
17 March 2025	Insurance update	<p>To notified impacted members in The King's School Superannuation Plan about a reduction of the insurance fee, changes to group life and group salary continuance insurance premium rates and some changes to terms and conditions.</p> <p>These changes are effective from 1 May 2025.</p>
17 March 2025	Insurance update	<p>To notified impacted members in the NEC Superannuation Plan about the introduction of the insurance fee, changes to group life and group salary continuance insurance premium rates and some changes to terms and conditions.</p> <p>These changes are effective from 1 May 2025.</p>

21 February 2025	Insurance update	<p>To notified impacted members in the BNP Paribas Superannuation Plan of changes to group life insurance premium rates, insurance design changes, and change to the Salary Continuance Insurance cover.</p> <p>These changes are effective from 1 April 2025.</p>
20 February 2025	Plan change	<p>To notified impacted members in the Insignia Financial Staff Plan (Plum) of a fee change.</p> <p>This is effective from 1 February 2025.</p>
19 February 2025	Insurance update	<p>To notified impacted members in the PepsiCo Australia Superannuation Plan and The Hempel (Wattyl) Superannuation Plan of changes to insurance including group life and group salary continuance insurance (SCI) premium rates, and changes to the terms and conditions of SCI cover.</p> <p>These changes are effective from 1 April 2025.</p>
31 January 2025	Investment changes	<p>To notify impacted members about the changes to NAB Staff MySuper investment fees and costs, investment objective and strategic asset allocation at 1 April 2025</p>
23 January 2025	Plan change	<p>To notify impacted members in the Ingham Staff Superannuation plan of a change to how premiums for Salary Continuance Insurance cover are paid.</p> <p>This is effective from 1 March 2025.</p>
16 January 2025	Insurance update	<p>To notify impacted members in the Albright & Wilson Superannuation plan and the Air Liquide Superannuation Plan of changes to group life insurance premium rates.</p> <p>This is effective from 1 March 2025.</p>
18 November 2024	Plan change	<p>To notify impacted members employed under Illawarra Coal division in the South32 Superannuation Plan that their super account balance and interests would be transferred to the GM3 Superannuation Plan in the Plum Super Fund.</p> <p>This is effective 1 January 2025</p>
13 November 2024	Insurance update	<p>To notify impacted members in the Spicers Superannuation Plan of changes to insurance including group life and group salary continuance insurance premium rates, changes to the terms and conditions of SCI and Life events cover.</p> <p>This is effective 1 January 2025</p>
13 November 2024	Insurance update	<p>To notify impacted members in the Orora Superannuation Plan of changes to insurance including group life and group salary continuance insurance premium rates, changes to the terms and conditions of SCI and Life events cover, and the introduction of the Insurance Fee.</p> <p>This is effective 1 January 2025</p>
27 September 2024	Planned system outage	<p>To advise Plum super members of a planned system outage from 22-26 November 2024. During this outage members will be unable to transact, or access secure web portals or apps.</p>
20 September 2024	Insurance update	<p>To notify impacted members in the Marriott Australia Superannuation Plan of changes to the group life and the group salary continuance insurance premium rates.</p> <p>This is effective 1 November 2024.</p>
20 September 2024	Insurance update	<p>To notify impacted members in the ASP Ship Management Superannuation Plan of changes to the group life premium rates.</p> <p>This is effective 1 November 2024.</p>

20 September 2024	Insurance update	<p>To notify impacted members in the Ingham Staff Superannuation Plan of a reduction to the insurance fees, changes to insurance including group life and group salary continuance insurance premium rates, and changes to the terms and conditions for SCI cover.</p> <p>This is effective 1 November 2024.</p>
20 September 2024	Insurance update	<p>To notify impacted members in the GPT Group Superannuation Plan of a reduction to the insurance fees and changes to group life and group salary continuance insurance premium rates.</p> <p>This is effective 1 November 2024.</p>
05 September 2024	Administration fee changes	<p>To advise members of Plum Corporate Plans of the following changes from 1 October 2024:</p> <ul style="list-style-type: none"> • A reduction to the percentage fee component of the Administration fee to 0.15% pa for all investment options where the current fee is above 0.15% pa. • A deduction from the general reserve of the MLC Super Fund, estimated at 0.05% pa of fund assets. • A reduction to the percentage fee component of the Administration fee from 0.30% pa to 0.15% pa for the Plum Personal Plan. <p>To advise members of Plum Personal Plans of the following changes from 1 October 2024:</p> <ul style="list-style-type: none"> • A reduction to the percentage fee component of the Administration fee to 0.15% pa for all investment options where the current fee is above 0.15% pa (no change where the fee is at or below 0.15% pa). • A deduction from the general reserve of the MLC Super Fund, estimated at 0.05% pa of fund assets. <p>To advise members of National Australia Bank Group Superannuation Fund A of the following changes from 1 October 2024:</p> <ul style="list-style-type: none"> • Decrease in percentage administration fee. • Percentage administration fee cap reduced to \$800 pa. • Member fee of \$1.50 per week introduced. • A deduction from the general reserve of the MLC Super Fund, estimated at 0.05% pa of fund assets.
20 August 2024	Insurance update	<p>To notify impacted members in the Agilent Super Plan of the changes to insurance including group life and group salary continuance insurance premium rates, and changes to the terms and conditions for SCI cover.</p> <p>This is effective 30 September 2024.</p>
14 August 2024	Administration fee changes	<p>To advise members of Plum Retirement Income of the following changes from 1 October 2024:</p> <ul style="list-style-type: none"> • Decrease in percentage administration fee. • Percentage administration fee cap reduced to \$800 pa. • Member fee of \$1.50 per week introduced.
19 July 2024	Insurance update	<p>To notify impacted members in the Sealed Air Superannuation Plan of a reduction to the insurance fee and changes to group life insurance premium rates.</p> <p>This is effective 1 September 2024.</p>
19 July 2024	Plan termination	<p>We're letting impacted Accumulation members in the Amcor Superannuation Fund (including retained and spouse members) that they'll be given the option of either moving to the Plum Personal Plan or to an external super fund of their choice.</p> <p>We're also informing pensioners in the Amcor Superannuation Fund that they will be given the option of either moving to Plum Retirement Income or to a pension offering of their choice.</p> <p>This is effective 1 September 2024.</p>

01 July 2024	Annual Statement Brochure 2024	<p>The brochure was attached to all 2024 Annual Statements and had the following content:</p> <ul style="list-style-type: none"> • Superannuation updates <ul style="list-style-type: none"> ◦ Super contribution caps to increase on 1 July 2024 ◦ Reduced tax concessions for balances over \$3 million • Investment updates <ul style="list-style-type: none"> ◦ MLC International Shares benchmark correction • Insurance updates <ul style="list-style-type: none"> ◦ Your annual insurance check-up
28 June 2024	Superannuation update	To notify impacted Plum defined benefit members about an update to their notional taxed contributions effective 1 July 2024
24 June 2024	Plan update	To notify impacted members in the Agilent Super Plan that their membership will be transferred to an accumulation membership in the Plum Corporate Plan effective from 1 September 2024.
20 June 2024	Insurance update	To notify members in the Carlton & United Breweries Superannuation Plan of the introduction of the Insurance Fee and some changes to the terms and conditions. These changes are effective from 1 August 2024.
20 June 2024	Insurance update	To notify members in the AbbVie Superannuation Plan of a reduction of the Insurance Fee and changes to group life premium rates. These changes are effective from 1 August 2024.
23 May 2024	Insurance update	<p>To notify members in the O'Brien Superannuation Plan of the changes to insurance including changes to the terms and conditions, changes to group life and group salary continuance insurance premium rates and the introduction of the Insurance Fee.</p> <p>This is effective 1 July 2024.</p>
23 May 2024	Insurance update	To notify members in the Visy Glass Australia Superannuation Plan that they'll commence paying some member fees and insurance premiums from 1 July 2024.
20 May 2024	Insurance update	To notify members in the British American Tobacco Superannuation Plan of the reduction in both the insurance fees and the premium rates for group life cover. These changes are effective from 1 July 2024.
20 May 2024	Insurance update	To notify members in the Viva Energy Superannuation Plan of the changes to insurance including group life premium rates, a reduction of the Insurance Fee, and the introduction of voluntary Salary Continuance Insurance cover. These changes are effective from 1 July 2024.
20 May 2024	Change to Insurance calculation	To notify impacted members in National Australia Bank Group Superannuation Fund there will be a change to the way their insurance benefit is calculated effective from 1 July 2024.
19 April 2024	Insurance update	To notify members in the Cochlear Superannuation Plan of new or updated insurance and fees.
15 April 2024	Insurance update	To notify members in the South32 Super Fund of the introduction of voluntary Salary Continuance Insurance for existing members.
19 March 2024	Insurance update	To notify members in the Insignia Financial Super Plan of a new insurer and insurance benefit redesign and re-rate.
20 February 2024	Plan change	To notify members in the CIMIC Group Superannuation Plan of a change of Plan and insurer.
20 February 2024	Insurance update	To notify members in the Carey Baptist Grammar School Superannuation Plan of new or updated insurance and fees.

20 February 2024	Insurance update	To notify members in Nufarm Employees Superannuation Trust (NEST) and Abbott Superannuation Plan of an insurance re-rate.
16 February 2024	Plan update	To notify impacted members in the Spicers Superannuation Plan that we're closing the Defined Benefit category moving members to Accumulation.
19 January 2024	Insurance update	To notify members in the Capral Superannuation Plan, Herbert Smith Freehills Superannuation Plan and Herbert Smith Freehills Partners Superannuation Plan of an insurance re-rate.
12 January 2024	Plan termination	To notify impacted members in Agilent Super that we're closing the Defined Benefit Category moving members to Accumulation.
20 December 2023	Insurance update	To notify members in the ITW Superannuation Plan and HanesBrands Superannuation Plan of new or updated insurance and fees.
20 December 2023	Insurance update	To notify members in the Findex Staff Superannuation Plan and Anglo American Superannuation Plan of an insurance re-rate.
20 November 2023	Insurance update	To notify members in the TWE Superannuation Plan of new or updated insurance and fees.
23 October 2023	Investment fund and fees and costs update	To notify members in the ASP Ship Management Superannuation Plan, AbbVie Superannuation Plan, Agfa-Gevaert Superannuation Plan, Albright & Wilson Superannuation Plan, Bank of America Merrill Lynch BlackRock Superannuation Plan, Boral Super, HP Super (HP PPS Australia), HP Super - DXC Ent Services, HP Super - Hewlett Packard Enterprise, ITW Superannuation Plan, Sydney Grammar School Superannuation Plan, The Hempel (Watty) Superannuation Plan and The King's School Superannuation Plan of updates to some investment funds and fees and costs.
19 October 2023	Plan change	To notify members in National Australia Bank Group Superannuation Fund A about the employer establishing a new super plan.
19 October 2023	Plan change	To notify members in the Exxon Mobil Superannuation Fund of new or updated insurance and fees.
16 October 2023	Plan change	To notify members in National Australia Bank Group Superannuation Fund A of a change of Plan and insurer.
11 October 2023	Investment menu changes	<p>To advise Plum Super members about changes to their investment menu occurring on 29 September 2023.</p> <p>We informed members that:</p> <ul style="list-style-type: none"> • We're introducing new investment options. • We're closing investment options to new investors and moving member balances in closed options to alternative options. <p>We're also making changes to some investment options. This includes changes to investment fees and costs, transaction costs, strategic asset allocation and to some investment option names.</p>
20 September 2023	Insurance update	To notify members in the Liberty Bell Bay Super Plan, South32 Super Fund, The Arnott's Group Superannuation Plan and BHP Super plan of new or updated insurance and fees.
15 September 2023	Plan change	To notify impacted members in The Arnott's Group Superannuation Plan of Defined Benefit calculation factor change.
18 August 2023	Insurance update	To notify members in the MSD Australia Superannuation Plan, Organon Pharma Superannuation plan, McDonald's Australia Superannuation Plan and Glencoresuper of new or updated insurance and fees.

18 August 2023	Plan change	To notify members in the Amcor Superannuation Fund that the Employer is establishing a new super plan, there will be some changes to fees.
11 August 2023	JANA Cash Fund investment option (JANACASH) closed	To inform impacted members in the BP Superannuation Plan that the JANA Cash Fund investment option (JANACASH) is closed. That if they don't update their investment choices, we'll switch their JANACASH investment to the Cash Fund.
10 August 2023	Insurance premium and product changes	To advise members in the Plum Corporate Plan and Plum Personal Plan about changes to their insurance on 29 September 2023.
21 July 2023	Insurance update	To notify members in the Camberwell Grammar School Superannuation Plan of an insurance re-rate.
21 July 2023	Insurance update	To notify members in the John Holland Superannuation Plan of new or updated insurance and fees.
14 July 2023	Insurance update	To notify members in the UBS Australia Superannuation Plan of an insurance re-rate.
01 July 2023	Annual Statement Brochure 2023	<p>The brochure was attached to all 2023 Annual Statements and had the following content:</p> <ul style="list-style-type: none"> • Product updates <ul style="list-style-type: none"> ◦ Our new investment menu ◦ Investment options to be renamed ◦ Buy-sell spread changes ◦ Closing investment options ◦ Non-lapsing binding death nominations • Insurance updates <ul style="list-style-type: none"> ◦ Your annual insurance check-up • Legislation updates <ul style="list-style-type: none"> ◦ Expansion of the Downsizer Scheme ◦ Temporary reduction in minimum pension requirements ended 30 June 2023