

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
18 June 2026	Insurance update	To notify members in the BP Superannuation Plan about the changes to group life and group salary continuance insurance premium rates, as well as certain updates to terms and conditions. These changes are effective from 1 August 2026.
17 June 2026	Insurance update	To notify members in the ACP Retirement Fund about the changes to group life insurance premium rates and some changes to terms and conditions. These changes are effective from 1 August 2026.
17 June 2026	Insurance update	To notify members in the AAMI Super about the changes to group life insurance premium rates and some changes to terms and conditions. These changes are effective from 1 August 2026.
15 June 2026	Plan change	To notify impacted Defined Benefit members in the BP Superannuation Plan that their membership will be transferred to a new account in the accumulation division of the plan.
20 May 2026	Insurance update	To notify members in the J.P. Morgan Superannuation Plan about the changes to group life insurance premium rates and some changes to terms and conditions. These changes are effective from 1 July 2026.
13 May 2026	Plan change	To notify Plum Term Allocated Pension members that their pension will transfer to a MLC MasterKey Term Allocated Pension. This is effective 1 June 2026.
8 May 2026	Plan change	To notify members in the ExxonMobil Super of a Plan name change. Members will have their plan name changed to either the ExxonMobil Super Plan or Esso Super Plan.
28 April 2026	Change of ownership	On 28 April 2026, CC Capital Partners LLC and its affiliates (a New York based private equity firm) and OneIM GP LLC and its affiliates (a London based private equity firm) acquired control of the Insignia Financial Group as a result of a scheme of arrangement.
20 April 2026	Plan change	To notify members of the Amcor Superannuation Fund of a plan name change. This change is effective from 16 October 2025.
20 April 2026	Insurance update	To notify members in the Ventia Superannuation Plan about the changes to group life and group salary continuance insurance premium rates and some changes to terms and conditions.
20 April 2026	Insurance update	To notify members in the Visy Glass Australia Superannuation Plan about the changes to group life and group salary continuance insurance premium rates and some changes to terms and conditions.
18 February 2026	Insurance update	To notify members of Bank of America BlackRock Super Plan of a change of insurer, changes to group life insurance premium rates and some changes to terms and conditions.
12 February 2026	Plan change	To notify impacted members of Plum employer plans of investment fee rebate reductions effective 1 April 2026.
20 January 2026	Insurance update	To notify members of the Hitachi Energy Australia Superannuation Plan about the changes to the terms and conditions for group life and group salary continuance insurance cover. These changes are effective from 1 March 2026.

15 December 2025	Insurance update	To notify members in the Mars Australia Retirement Plan about changes to group life and group salary continuance insurance premium rates and some changes to terms and conditions. These changes are effective from 1 February 2026.
20 November 2025	Plan change	To notify affected members in Boral Super about the introduction of the member fee and the reduction of the plan management fee. These changes are effective from 1 January 2026.
20 November 2025	Insurance update	To notify members in the HP Super 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. These changes are effective from 1 January 2026.
20 November 2025	Plan Administration fee cap reduction	The annual Plan Management fee charged to each account (excluding the fixed fee or Trustee Levy) is reducing from a maximum of \$2,500 per year to \$1,000 per year, effective 1 April 2026.
06 November 2025	Plan change	To notify Defined Benefit members in the Insignia Financial Superannuation Plan that their membership will be transferred to an Accumulation super plan.
24 October 2025	Plan change	To notify members in the Insignia Financial Superannuation Plan of a fee change. This change is effective from 1 December 2025.
19 September 2025	Insurance update	To notify members in the APA Group Superannuation plan about the introduction of the insurance fee, changes to group life insurance premium rates and some changes to terms and conditions. These changes are effective from 1 November 2025.
25 August 2025	Term Allocated Pension Changes	To notify members of Plum Term Allocated Pension that regulations have been passed allowing the full commutation and withdrawal of their account for a limited period, ending on 6 December 2029.
22 July 2025	Insurance update	To notify members in the Iluka Resources 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. These changes are effective from 1 September 2025.
22 July 2025	Insurance update	To notify members in Downer Super about the changes to the insurance fee, changes to group life and group salary continuance insurance premium rates and some changes to terms and conditions. These changes are effective from 1 September 2025.

01 July 2025	Annual Statement Brochure 2025	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: • Regulatory changes ◦ Transfer balance cap increase ◦ Term Allocated Pension commutation changes • Investment updates ◦ 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 ◦ 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 ◦ MLC Life Insurance to trade as Acenda
30 June 2025	Superannuation update	To notify impacted Plum defined benefit members about an update to their notional taxed contributions effective 1 July 2025
19 June 2025	Insurance update	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. These changes are effective from 1 August 2025.
19 June 2025	Insurance update	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. These changes are effective from 1 August 2025.
19 June 2025	Insurance update	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. These changes are effective from 1 August 2025.
22 May 2025	Insurance update	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. These changes are effective from 1 July 2025.
20 May 2025	Insurance update	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. These changes are effective from 1 July 2025.

20 May 2025	Insurance update	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.
20 May 2025	Plan change	To notify members in the TWE Superannuation Plan of a fee change.
28 April 2025	Investment menu changes	To advise members of Plum Super with holdings in MLC Flexible Moderate and MLC Flexible Assertive that these investment options will be terminating.
28 April 2025	Tax deduction	To notify members of Plum of changes to how we pass back the benefit of tax deductions, effective 1 July 2025.
17 April 2025	Insurance update	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. These changes are effective from 1 June 2025.
17 April 2025	Insurance update	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. These changes are effective from 1 June 2025.
17 April 2025	Insurance update	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. These changes are effective from 1 June 2025.
14 April 2025	Plan Management Fee Reduction	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.
24 March 2025	Plan change	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. This is effective from 1 May 2025.
21 March 2025	Investment Fee update	To notify impacted members of Plum employer plans of investment fee rebate reductions effective 1 May 2025.
17 March 2025	Insurance update	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. These changes are effective from 1 May 2025.
17 March 2025	Insurance update	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. These changes are effective from 1 May 2025.
21 February 2025	Insurance update	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. These changes are effective from 1 April 2025.

20 February 2025	Plan change	To notified impacted members in the Insignia Financial Staff Plan (Plum) of a fee change. This is effective from 1 February 2025.
19 February 2025	Insurance update	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. These changes are effective from 1 April 2025.
31 January 2025	Investment changes	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
23 January 2025	Plan change	To notify impacted members in the Ingham Staff Superannuation plan of a change to how premiums for Salary Continuance Insurance cover are paid. This is effective from 1 March 2025.
16 January 2025	Insurance update	To notify impacted members in the Albright & Wilson Superannuation plan and the Air Liquide Superannuation Plan of changes to group life insurance premium rates. This is effective from 1 March 2025.
18 November 2024	Plan change	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. This is effective 1 January 2025
13 November 2024	Insurance update	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. This is effective 1 January 2025
13 November 2024	Insurance update	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. This is effective 1 January 2025
27 September 2024	Planned system outage	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.
20 September 2024	Insurance update	To notify impacted members in the Marriott Australia Superannuation Plan of changes to the group life and the group salary continuance insurance premium rates. This is effective 1 November 2024.
20 September 2024	Insurance update	To notify impacted members in the ASP Ship Management Superannuation Plan of changes to the group life premium rates. This is effective 1 November 2024.
20 September 2024	Insurance update	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. This is effective 1 November 2024.

20 September 2024	Insurance update	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. This is effective 1 November 2024.
05 September 2024	Administration fee changes	To advise members of Plum Corporate Plans of the following changes from 1 October 2024: • 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. To advise members of Plum Personal Plans of the following changes from 1 October 2024: • 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. To advise members of National Australia Bank Group Superannuation Fund A of the following changes from 1 October 2024: • 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	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. This is effective 30 September 2024.
14 August 2024	Administration fee changes	To advise members of Plum Retirement Income of the following changes from 1 October 2024: • 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	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. This is effective 1 September 2024.
19 July 2024	Plan termination	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. 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. This is effective 1 September 2024.

01 July 2024

**Annual Statement
Brochure 2024**

The brochure was attached to all 2024 Annual Statements and had the following content:

- Superannuation updates
 - Super contribution caps to increase on 1 July 2024
 - Reduced tax concessions for balances over \$3 million
 - Investment updates
 - MLC International Shares benchmark correction
 - Insurance updates
 - Your annual insurance check-up
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