

Transfer your super into AustralianSuper

Pension

By completing this form, you will request the transfer of the WHOLE balance of your superannuation benefits between funds. This form can NOT be used to transfer part of the balance of your superannuation benefits. It is for whole balance transfers only. Please complete in pen using BLOCK letters. Print 'X' to mark boxes where applicable. Form must be completed in full.

Before completing this form

- Read the important information below.
- Check that the fund you are transferring your benefits to can accept this transfer.

When completing this form

- Print clearly in BLOCK LETTERS.

After completing this form

- Sign the authorisation.
- Attach the appropriately certified proof of identity documents.
- Review the checklist below.
- Send the request form to your fund.

IMPORTANT INFORMATION

This transfer may close your account (you will need to check this with your *from* fund).

This form can NOT be used to:

- transfer part of the balance of your superannuation benefits
- transfer benefits if you don't know where your superannuation is
- transfer benefits from multiple funds on this one form – a separate form must be completed for each fund you wish to transfer superannuation from
- change the fund to which your employer pays contributions on your behalf
- open a superannuation account, or
- transfer benefits under certain conditions or circumstances, for example if there is a superannuation agreement under the Family Law Act 1975 in place.

What happens to my future employer contributions?

Using this form to transfer your benefits will not change the fund to which your employer pays your

contributions and may close the account you are transferring your benefits *from*.

If you wish to change the fund into which your contributions are being paid, you will need to speak to your employer about Choice of Fund. For the appropriate forms and information about whether you are eligible to choose the fund to which your employer contributions are made, visit www.ato.gov.au/super or call the Australian Taxation Office on 13 10 20.

Things you need to consider when transferring your superannuation

When you transfer your superannuation, your entitlements under that fund may cease. You need to consider all relevant information before you make a decision to transfer your superannuation. If you ask for information, your superannuation provider must give it to you. Some of the points you may consider are:

- **Fees** – your *from* fund must give you information about any exit or withdrawal fees. If you are not aware of the fees that may apply, you should contact your fund for further information before completing this form. The fees could include administration fees as well as exit or withdrawal fees. Some funds may also charge entry or deposit fees on transfer although AustralianSuper does not. Differences in fees funds charge can have a significant effect on what you will have to retire on. For example, a 1% increase in fees may significantly reduce your final benefit.
- **Death and disability benefits** – your *from* fund may insure you against death, illness or an accident which leaves you unable to return to work. If you choose to leave your current fund, you may lose any insurance entitlements you have. Other funds may not offer insurance, or may require you to pass a medical examination

before they cover you. When considering a new fund, you may wish to check the costs and amount of any cover offered.

What happens if I do not quote my Tax File Number (TFN)?

You are not obligated to provide your TFN to your superannuation fund. However, if you do not provide your TFN, your fund may be taxed at the highest marginal tax rate plus the Medicare levy on contributions made to your account in the year, compared to the concessional tax rate of 15%. Your fund may deduct this additional tax from your account.

If your superannuation fund does not have your TFN, you will not be able to make personal contributions to your superannuation account. Choosing to quote your TFN will also make it easier to keep track of your superannuation in the future.

Under the *Superannuation Industry (Supervision) Act 1993*, your superannuation fund is authorised to collect your TFN, which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change. The TFN may be disclosed to another superannuation provider, when your benefits are being transferred, unless you request in writing that your TFN is not to be disclosed to any other trustee.

Checklist?

- Have you read the important information?
- Have you considered where your future employer contributions will be paid?
- Have you checked your TO fund can accept the transfer?
- Have you completed all of the mandatory fields on the form?
- Have you signed and dated the form?
- Have you attached the certified documentation including any linking documents if applicable?

Completing proof of identity

You will need to provide documentation with this transfer request to prove you are the person to whom the superannuation entitlements belong.

1. Acceptable documents

The following documents may be used.

EITHER one of the following documents only:

- driver's licence issued under State or Territory law
- passport.

OR one of the following documents:

- birth certificate or birth extract
- citizenship certificate issued by the Commonwealth
- pension card issued by Centrelink that entitles the person to financial benefits.

AND one of the following documents:

- letter from Centrelink regarding a Government assistance payment
- notice issued by Commonwealth, State or Territory Government or local council within the past twelve months that contains your name and residential address. For example:
 - Tax Office Notice of Assessment
 - Rates notice from local council.

2. Have you changed your name or are you signing on behalf of another person?

If you have changed your name or are signing on behalf of the applicant, you will need to provide a certified linking document. A linking document is a document that proves a relationship exists between two (or more) names.

The following table contains information about suitable linking documents.

Purpose	Suitable linking documents
Change of name	Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office.
Signed on behalf of the applicant	Guardianship papers or Power of Attorney.

3. Certification of personal documents

All copied pages of ORIGINAL proof of identification documents (including any linking documents) need to be certified as true copies by any individual approved to do so (see below).

The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (Justice of the Peace, Australia Post employee etc) and date.

The following can certify copies of the originals as true and correct copies:

- a permanent employee of Australia Post with five or more years of continuous service
- a finance company officer with five or more years of continuous service (with one or more finance companies)
- an officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having five or more years continuous service with one or more licensees
- a notary public officer
- a police officer
- a registrar or deputy registrar of a court
- a Justice of the Peace
- a person enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia, as a legal practitioner
- an Australian consular officer or an Australian diplomatic officer
- a judge of a court
- a magistrate, or
- a Chief Executive Officer of a Commonwealth court.

4. Where do I send the form?

Please return this completed form to:

**AustralianSuper Pension
Locked Bag 6
Carlton South VIC 3053**

Transfer your super – full transfer of funds only

Pension

This form must be completed in full. Please ensure you sign and date the form in Section 4 in the Authorisation section below, or we will be unable to process your transfer.

Please complete in pen using BLOCK letters. Print 'X' to mark boxes where applicable. Only complete this form if you are transferring your superannuation benefit/s into the AustralianSuper Pension, and it is for a full transfer of funds. You will need to complete a separate form for each fund you wish to transfer. Please make a copy of this form if you have more than one transfer.

1. MEMBER DETAILS

Surname	Mr	Ms	Mrs	Miss	Dr	Other
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Given names	Date of birth					
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other/previous names	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Street address						
Suburb	State	Postcode				
Previous street address (if details with your FROM fund are different to those above)						
Suburb	State	Postcode				
Tax file number (TFN)	Sex	Email				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Telephone (BH)	(AH)	Mobile				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. FUND DETAILS

FROM: Fund's name	TO: Fund's name
<input type="checkbox"/>	A U S T R A L I A N S U P E R
<input type="checkbox"/>	P E N S I O N
Fund phone number	Fund phone number
<input type="checkbox"/>	1300 789 932
Membership or account number	Membership or account number
<input type="checkbox"/>	<input type="checkbox"/>
Australian Business Number (ABN)	Australian Business Number (ABN)
<input type="checkbox"/>	65 714 394 898
Superannuation Product Identification Number (SPIN)	Superannuation Product Identification Number (SPIN)
<input type="checkbox"/>	STA0002AU
If you have multiple account numbers with this fund, you must complete a separate form for each account you wish to transfer.	You must check with AustralianSuper to ensure they can accept this transfer.

3. PROOF OF IDENTITY

I have attached a certified copy of my driver's licence or passport

OR I have attached certified copies of both:

Birth/Citizenship Certificate or Centrelink Pension Card

AND Centrelink payment letter or Government or local council notice (less than 1 year old) with my name and residential address

4. AUTHORISATION

By signing this request form I am making the following statements:

- I declare I have fully read this form and the information completed is true and correct
- I am aware I may ask my superannuation provider for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits, and do not require any further information.
- I discharge the superannuation provider of my **from** fund of all further liability in respect of the benefits paid and transferred to AustralianSuper.

I request and consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect to this transfer.

Signature

Date