Transfer to the Personal Plan

AustralianSuper

Who can use this form?

You can use this form if you're an existing AustralianSuper member in the AustralianSuper plan or Super Options product and you want to transfer your super account to the Personal Plan.

If you have insurance cover[1], you must transfer the whole amount of your existing cover. Your cover will have the same conditions and exclusions that applied previously and it may be limited cover. See the *Insurance in your super* guide for more details. Download a copy at **australiansuper.com/InsuranceGuide**

Please see the *Personal Plan Product Disclosure Statement* for more information about the product you're transferring your super account to at **australiansuper.com/pds** Please refer to the Target Market Determination (TMDs) for the Personal Plan to ensure the Personal Plan is right for you. A TMD is a document that outlines the target market a product has been designed for. Find the Personal Plan TMD at **australiansuper.com/tmd**

Please complete in pen using CAPITAL letters. Print (✗) to mark boxes where applicable. Read the Privacy Collection Statement on page 2 of this form to see how AustralianSuper uses your personal information.

1 Your personal details

Last name

Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Dr ☐

First name/s

Date of birth (D D M M Y Y Y Y)

Member number

Male ☐ Female ☐

Street address

Suburb

State

Postcode

Postal address (if different)

Suburb

State

Postcode

Telephone (business hours)

Telephone (after hours)

Mobile

Email

2 Your new Personal Plan product

Your super account and any existing insurance cover you have will be transferred to the Personal Plan (if eligible). Your insurance cover amount(s), the cost of your cover and individual work rating will stay the same. Your Income Protection waiting period and benefit payment period will remain unchanged (if applicable). Any election to keep or extend cover (as at the transfer date) will continue in the Personal Plan. If your existing cover is subject to any exclusions, including but not limited to pre-existing condition exclusions or restrictions, these special conditions will be transferred with your cover to the Personal Plan.

Your member number, log in details, administration fees and costs, investment choices and costs, and any beneficiary nominations associated with your super account remain the same.

Print (✗) to confirm that you wish to transfer your super account to the Personal Plan. ☐

Don't have insurance cover?

If you don't have insurance cover, you won't get cover automatically when you transfer your super account to the Personal Plan using this form. Basic cover is not provided in the Personal Plan. If you want cover in the future, you'll need to apply and provide health information for the Insurer to consider.

Applied for cover that's been accepted by the Insurer, but it hasn't started yet?

If your accepted cover doesn't start before your super account is transferred to the Personal Plan, the cover you applied for will start in the Personal Plan on the later of the date your super account is transferred to the Personal Plan or the date you have enough money in your super account to cover the cost of the first month of insurance. If your super account is inactive (you haven't received a contribution or rollover for 16 consecutive months), see what that means for you in the *Insurance in your super* guide.

Learn more about insurance cover, how to apply for it and when cover starts, in the *Insurance in your super* guide at **australiansuper.com/InsuranceGuide**

[1] AustralianSuper insurance is provided by TAL Life Limited (the Insurer), ABN 70 050 109 450, AFSL 237848.

3 Declaration and acknowledgement

This section must be completed in all circumstances.

I declare that:

- I've read and understood the information provided on this form.
- I'm aware that a document that outlines the target market each AustralianSuper product is designed for is available at **australiansuper.com/tmd**
- I've read and understood the *Personal Plan Product Disclosure Statement* at **australiansuper.com/pds** and the *Insurance in your super* guide at **australiansuper.com/InsuranceGuide** and understand that the additional information referred to in the guide forms part of the Product Disclosure Statement.
- I've read the Privacy Collection Statement below and I understand how AustralianSuper will use my personal information.

I acknowledge that:

- My eligibility to claim for benefits will be determined in line with AustralianSuper's insurance policy terms and conditions.
- Insurance cover will only be provided in line with the insurance policy terms and conditions as agreed between AustralianSuper and the Insurer. Those terms and conditions may change from time to time and AustralianSuper will notify me of those changes where required by law.
- If I don't fully complete, sign and date this application, I won't be eligible to transfer my existing super account and cover to the Personal Plan.
- If my application is accepted, all my cover will be subject to the terms and conditions of AustralianSuper's insurance arrangements for the Personal Plan.
- For cover that's been accepted by the Insurer, AustralianSuper will confirm when it will start (if applicable).
- A scanned copy or photocopy of this authorisation is as valid as the original.

Sign here

Date

D D M M Y Y Y Y

Print full name

A summary of AustralianSuper's Privacy Collection Statement is below. Our Privacy Collection Statement and Privacy Policy may change from time to time. The latest versions will be available online at **australiansuper.com/CollectionStatement** and **australiansuper.com/privacy-policy**

For information on the Insurer's privacy and information handling practices, read their Privacy Policy Statement at **tal.com.au** or call **1300 302 961** for a copy.

Privacy Collection Statement

AustralianSuper Pty Ltd (ABN 94 006 457 987) of AustralianSuper GPO Box 1901, Melbourne, Victoria 3001, collects your personal information, including your name, date of birth, contact details, member number. We collect this information to operate and administer your super account(s) (including insurance) or retirement income account, improve our products and services and keep you informed. If we can't collect your personal information, we may not be able to establish or maintain your account. While we primarily collect personal information directly from you, we may also collect personal information from third parties, like your employer and your financial adviser (if applicable). We may disclose your personal information where reasonably necessary for the purposes described above to our insurer (TAL Life Limited, ABN 70 050 109 450, AFSL 237848), our administrator, Australian Administration Services Pty Ltd (part of MUFG Pension & Market Services Holdings Ltd); our contact centre provider, Concentrix Services Pty Ltd; your authorised representative or financial adviser (where applicable); government, regulatory and law enforcement authorities; and other parties where required or authorised by law, court order or tribunal order, or with your consent. Some of these organisations may access or process your personal information outside Australia, including overseas service providers engaged by your financial adviser (where applicable). Our Privacy Policy explains how you can access and correct your personal information, how to make a privacy complaint, and how we will deal with your complaint. The Privacy Policy is available at **australiansuper.com/privacy**