Seamless Transfer of your Member Direct account

If you are currently invested in Member Direct, use this form to open a Choice Income account without having to sell and re-purchase your holdings in Member Direct, preventing the trigger of capital gains and losses.

Who should use this form?

This form is to be used by members with an existing Member Direct account who wish to open a Choice Income account without having to sell their existing holding in Member Direct.

How Seamless Transfer works

We transfer your existing Member Direct account balance from your super account to a new Choice Income account. Transferring means you can stay invested and removes any costs associated with transaction costs and market risk. For Seamless Transfer, the whole Member Direct balance must be transferred across – partial transfers of your Member Direct account are not possible.

Important information about Seamless Transfer

• Seamless Transfer is tax free. It does not realise any capital gains or losses. When you Seamless Transfer, any unused realised or unrealised capital losses will no longer be useable to offset future realised capital gains in Choice Income.
• You won’t have access to trade, or be able to monitor investments while they’re being transferred. The process to open a new Choice Income account and to transfer your Member Direct account can take up to 14 business days. You’ll receive an email confirmation when the transfer is complete.
• Seamless Transfer cannot commence when certain types of corporate actions are pending.
• Limit orders must be completed or cancelled before requesting a Seamless Transfer.
• Seamless Transfer can only take place after your Choice Income account is set up. Your new Choice Income account won’t start until all funds have been received (no earnings apply on money during the transfer process and market movements may occur during this period).
• Term deposits are not transferrable with Seamless Transfer. This means we’ll break the term deposit(s) if it is not matured before we complete the transfer. Your effective rate of interest will be reduced in accordance with the discount factors available at australiansuper.com/MemberDirect
• Funds in your cash account will be transferred to your Choice Income account without any change.
• Minimum balance requirements on the cash account and investment limits on balances and trades will continue to apply after Seamless Transfer is completed.

Refer to Member Direct Terms and Conditions at australiansuper.com/MemberDirectTCs

Financial Advice

Transferring may not be the best option. Please ensure you understand the impact on your tax position and seek financial advice. A professional financial adviser can help you understand whether Seamless Transfer makes sense for you. AustralianSuper can refer you to a financial adviser. For more information on your advice options with AustralianSuper call 1300 300 273 between 8am to 8pm (AEST/AEDT) weekdays or visit australiansuper.com/advice

Privacy Collection Statement

Please read this Privacy Collection Statement to see how AustralianSuper uses your personal information.

AustralianSuper Pty Ltd (ABN 94 006 457 987) of 26/50 Lonsdale Street, Melbourne, Victoria, collects your personal information (PI) to run your super account (including insurance), improve our products and services and keep you informed. If we can’t collect your PI we may not be able to do these tasks. PI is collected from you but sometimes from third parties like your employer. We will only share your PI where necessary to perform our activities with our administrator, service providers, as required by law or court/tribunal order, or with your permission. Your PI may be accessed overseas by some of our service providers. A list of countries can be found at the URLs below. Our Privacy Policy details how to access and change your PI, as well as the privacy complaints process. For complete details on the above go to australiansuper.com/CollectionStatement and australiansuper.com/privacy or call us on 1300 300 273.
Open a Choice Income account
Member Direct

This form is only for members who have an existing AustralianSuper Member Direct account. If you’re below age 60 you MUST complete the Tax file number declaration form and return it with this form. Please complete in pen using CAPITAL letters. Print X to mark boxes.

1. YOUR PERSONAL AND CONTACT DETAILS

Last name

First name/s

Street address

Suburb

Postal address (if different to street address)

Suburb/Town

Home telephone

Other telephone (eg business)

Mobile

Email

If I provide my email address and/or phone number, I’m consenting to AustralianSuper communicating with me via email, my online account, mobile app and phone as appropriate. I understand I can change my communication preferences through my online account or by calling 1300 300 273.

2. HAVE YOU FINALISED YOUR TAX DEDUCTIONS?

If you are claiming a tax deduction for personal contributions, have you finalised your tax deductions for your super contributions?

X Not applicable (go to step 3)

X Yes (go to step 3)

X No You must finalise the tax deduction with your super fund before you transfer your super to your Choice Income account.

3. DO YOU QUALIFY?

Are you eligible to open a Choice Income account? Choose (X) the option that applies to you.

X I’m 65 or older (go to step 4)

X I’ve permanently retired from work and reached my preservation age (go to step 4)

X I’ve changed jobs on or after turning 60 (go to step 4)

If none of the above options apply to you, there are still other circumstances where you may be able to open a Choice Income account. Please call 1300 300 273 for help.
4. ARE YOU OPENING YOUR CHOICE INCOME ACCOUNT WITH SUPER FROM AUSTRALIANSUPER?

Do you want to transfer super from your AustralianSuper account/s to open a Choice Income account? You’ll need to transfer a minimum of $50,000 to open an account.

**X** Yes (go to step 4a) **X** No (go to step 4e)

Please fill in details for each AustralianSuper account

a) What’s your existing AustralianSuper member number?

b) Do you want to transfer your entire balance?

Account 1:

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<tr>
<td></td>
<td>X</td>
<td>Yes (go to step 5)</td>
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<td>X</td>
<td>$6,000</td>
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<td></td>
<td>No (go to either step 4c or 4d)</td>
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<td>X</td>
<td>Other amount</td>
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Account 2:

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Account 3:

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<td>Yes (go to step 5)</td>
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<td>No (go to either step 4c or 4d)</td>
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<td>X</td>
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c) How much money do you want to leave in your AustralianSuper super account?**†**

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<td>X</td>
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Account 3:

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<td>X</td>
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d) Do you want to transfer a nominated amount to your Choice Income account?**††**

Account 1:

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<td>X</td>
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Account 2:

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Account 3:

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<tr>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
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</tbody>
</table>

* When transferring from an AustralianSuper super account to open a Choice Income account, you’ll need to leave a minimum balance of $6,000 in your super account for it to remain open. To find out more about the minimum balance, visit australiansuper.com/AccessYourSuper.

† If you want to keep your insurance cover you’ll need to have enough money in your super account to pay for it. To understand how to maintain cover, read our Insurance in your super guide at australiansuper.com/InsuranceGuide.

‡ This will close your existing AustralianSuper account. Any insurance cover you have with this account will cease.

e) Do you want to Seamless Transfer your entire Member Direct account to your new Choice Income account? (Note: partial transfer is not available from Member Direct into Choice Income.) **X** Yes **X** No

By selecting ‘Yes’ I acknowledge that I:

- understand the possible tax outcomes
- have sought tax advice as needed
- understand that any un-matured term deposits will be broken prior to transfer
- understand that I won’t have access to trade, or be able to monitor investments, during the transfer process.

By selecting ‘No’ your Member Direct holdings will remain in your super account.
5. ARE YOU OPENING YOUR CHOICE INCOME ACCOUNT WITH SUPER FROM ANOTHER FUND?

If you have more than one fund to roll into AustralianSuper, you must complete a Combine your super into AustralianSuper form for each additional fund you wish to roll over. This form is available online under the ‘Retirement’ tab at australiansuper.com/forms. You’ll need to transfer a minimum of $50,000 to open an account.

a) Provide your fund’s details

FROM: Fund name

<table>
<thead>
<tr>
<th>Fund phone number</th>
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<tbody>
<tr>
<td>Member or account number</td>
<td></td>
</tr>
<tr>
<td>Australian Business Number (ABN)</td>
<td></td>
</tr>
<tr>
<td>Unique Superannuation Identifier (USI)</td>
<td></td>
</tr>
</tbody>
</table>

Amount to transfer (choose one only)

- Whole balance
- Partial amount of $__,____,____.00

Mark (X) this box if you’ve attached a separate sheet because there wasn’t enough space here.

TO: Fund’s name

<table>
<thead>
<tr>
<th>AustralianSuper</th>
</tr>
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<tbody>
<tr>
<td>1300 300 273</td>
</tr>
<tr>
<td>65 714 394 898</td>
</tr>
<tr>
<td>STA0002AU</td>
</tr>
</tbody>
</table>

b) Provide us with your TFN

To protect your super, you need to prove your identity when you move money between super funds.

If you don’t want to give us your TFN, you must complete a Combine your super into AustralianSuper form and provide certified copies of your identity documents (ID) for each additional fund you wish to roll over. This form is available online under the ‘Retirement’ tab at australiansuper.com/forms.

If you don’t provide the right ID correctly certified, it will delay the transfer. For help on providing proof of ID go to australiansuper.com/IDHelp.

Use my Tax File Number (TFN) to identify me.

Provide your TFN here

Your TFN is the easiest way to identify you. By giving us your TFN, you are authorising us to give this information to your other super fund. They will confirm your ID with the Australian Tax Office.

Providing your TFN

We’re authorised under super law to collect, use and disclose your Tax File Number (TFN). You don’t have to provide your TFN, but if we have it, we’ll be able to accept all types of contributions into your super account if you have one; you won’t pay more tax than you need to and it’ll be easier to find any lost super. If you transfer to another fund, we’ll give them your TFN unless you tell us not to in writing. Visit australiansuper.com/RefTFN for more details.
8. CHOOSE YOUR INVESTMENTS

This allocation nominates how you wish to invest your Choice Income account balance and excludes the balance of your current Member Direct investments.

Do you want to choose how to invest your account?

X Yes. Fill in the percentage you want to invest in each investment option.

X No. If you don’t make an investment choice your account will be invested in the Balanced option (go to step 10).

Seamless Transfer

If you selected Seamless Transfer in step 4e, your fees and income payments will be taken from each investment option in proportion to the balance in each option. Once your Choice Income account is set up, you can choose from which option to have your payments deducted. Simply log in to your online account to make your selection.

Member Direct

You can’t choose to draw your payments from Member Direct.

Property option

You can only invest in the Property option through your account online. You will be able to do this after your Choice Income account has been set up.

<table>
<thead>
<tr>
<th>Investment option</th>
<th>% to invest in</th>
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</thead>
<tbody>
<tr>
<td>High Growth</td>
<td></td>
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<tr>
<td>Balanced</td>
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<tr>
<td>Socially Aware</td>
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<tr>
<td>Indexed Diversified</td>
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<tr>
<td>Conservative Balanced</td>
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<tr>
<td>Stable</td>
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<tr>
<td>Australian Shares</td>
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<td>International Shares</td>
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<tr>
<td>Diversified Fixed Interest</td>
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<tr>
<td>Cash</td>
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<tr>
<td>TOTAL MUST ADD UP TO 100%</td>
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9. NOMINATE BENEFICIARIES

Please choose (X) one option only. See page 39 of the Choice Income PDS.

**Option 1. Reversionary nomination**

<table>
<thead>
<tr>
<th>Last name</th>
<th>Mr</th>
<th>Ms</th>
<th>Mrs</th>
<th>Miss</th>
<th>Dr</th>
</tr>
</thead>
<tbody>
<tr>
<td>First name/s</td>
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Relationship to you | Date of birth

**Option 2. Binding nomination**

Please complete the *Binding death benefit nomination* form at the back of the *Choice Income Product Disclosure Statement* and attach it to this application.

**Option 3. Non-binding nomination**

<table>
<thead>
<tr>
<th>Full name</th>
<th>Relationship</th>
<th>Residential address</th>
<th>% of benefit</th>
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<tbody>
<tr>
<td>X Spouse</td>
<td>Financial dependant</td>
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<tr>
<td>X Child</td>
<td>Financial dependant</td>
<td>[ ]</td>
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</tr>
<tr>
<td>X Interdependent</td>
<td>Financial dependant</td>
<td>[ ]</td>
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</tbody>
</table>

**TOTAL MUST ADD UP TO 100%**

1 0 0 %

**X** Mark (X) this box if you’ve attached a separate sheet because there wasn’t enough space here.

It’s important to note that in some cases making a reversionary nomination may impact your Centrelink benefits. Contact the Department of Social Services at dss.gov.au if you have questions regarding your Centrelink entitlements.
10. GIVE YOUR FINANCIAL ADVISER ACCESS TO YOUR ACCOUNT DETAILS

If you have a financial adviser, you can give them access to your Choice Income account below. If not, go to step 12.

Name of financial adviser

Name of business

Email

Telephone AFSL number (if known)

If your adviser is licensed through Industry Fund Services (IFS), your adviser’s access to your account will automatically expire three years after the date you signed this form.

11. PROVIDE PROOF OF YOUR IDENTITY

Please complete one of the options below.

Option 1 – I want to use electronic verification

By giving you my Medicare, driver’s licence or Australian passport details below, I authorise the use of my personal details (including the information below) for the purpose of electronic data verification. I understand that my information will be subject to an information match request in relation to relevant official record holder information and a corresponding information match result will be provided via the use of third party systems.

Fill out any TWO of the following, and Option 1 box above.

1. Full name as appears on my Medicare card
   My Medicare number is ____________________________
   My reference number on this card is ______________
   Valid to MM MM YY

2. Full name as appears on my Driver’s Licence
   My Australian Driver’s Licence number is ______________
   State of issue ______________
   Expiry date DD MM YY

3. My Australian passport number is ______________
   Place of birth (as shown on your passport)
   Country of birth (not shown on your passport)
   Family name at birth (not shown on your passport)

Option 2 – I want to attach paper copies of certified documentation

I have attached my certified proof of identity to this application.
Please ensure that you provide photocopies of your original identification documents and that they are correctly certified.

Each page must be certified as a true copy. For instructions on who can certify documents, go to australiansuper.com/IDHelp

Use electronic verification if paper copies of certified documentation are incorrectly certified or unable to be read

I authorise the use of my personal details for the purpose of electronic data verification if the paper copies of my certified documentation are incorrectly certified or unable to be read. I understand that my information will be subject to an information match request in relation to relevant official record holder information and a corresponding information match result will be provided via the use of third party systems.
I have read the Privacy Collection Statement and I understand how AustralianSuper will use my personal information. AustralianSuper’s Privacy Collection Statement is available online at australiansuper.com/CollectionStatement

The information is correct: To the best of my knowledge, the information I have provided on this form is correct.

I confirm I am either an Australian citizen/permanent resident, a New Zealand citizen or I hold an eligible retirement visa (subclass 405 or 410).

If I’ve provided my email address and/or phone number, I consent to AustralianSuper sending me information about my account, AustralianSuper’s products and services and marketing communications, including third-party products and services, via email, my online account, SMS, mobile app or phone, as appropriate and in accordance with AustralianSuper’s Privacy Policy.

I understand I can change my communication preferences at any time by calling AustralianSuper on 1300 300 273 or through the My communication preferences section of my online account.

The information will be used to open the account: The personal information I have provided will be used to open my account. My account will be set up based on the choices I’ve made as fully explained in the Choice Income Product Disclosure Statement, available at australiansuper.com/RetirementGuide

Sign here

Date

Print full name