Merge your AustralianSuper super accounts

AustralianSuper

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To request to merge your AustralianSuper super accounts (and combine any insurance cover before the merge), please fill in the form below.

Once your cover is combined to your chosen super account and your super accounts are merged, your additional super account(s) will be closed.

When you've completed this form, please sign and return it by email or by post - see details on page 3 of this form.

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

Fill in your personal details

| Last name | | Mr Mrs Ms Miss Dr |
|----------------------------|-------------------------|-------------------|
| First name/s | | |
| | | |
| Date of birth | | |
| DDMMYYYY | | |
| Street address | | |
| | | |
| Suburb | | State Postcode |
| | | |
| Telephone (business hours) | Telephone (after hours) | 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 by logging into my account via AustralianSuper's website at **australiansuper.com**

2 Merge your super accounts

You want to merge your additional super account(s) to your chosen super account. Once your super accounts are merged, your additional super account(s) will be closed, and any insurance cover in the additional account(s) will stop.

I choose the super account listed below to be my chosen super account. Please merge my additional super account(s) listed below, to this chosen super account.

| My chosen super account number | |
|----------------------------------|--|
| Please merge my additional super | ccount(s) listed below to my chosen super account (listed above) |
| Additional account number | Additional account number |
| | |

| Add | | nai | acco | oun | t nu | mpe | er | | | |
|---------------------------|--|-----|------|-----|------|-----|----|--|--|--|
| | | | | | | | | | | |
| | | | | | | | | | | |
| Additional account number | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |

Any additional super accounts not listed above will remain open.



Additional account number

Issued by AustralianSuper Pty Ltd ABN 94 006 457 987 AFSL 233788 Trustee of AustralianSuper ABN 65 714 394 898. A Target Market Determination (TMD) is a document that outlines the target market a product has been designed for. Find the TMDs at **australiansuper.com/tmd**

Important note

When you request to merge your additional super account(s) to your chosen super account,

- your chosen super account will retain its beneficiary nomination(s). All other beneficiary nominations in your closed additional super account(s) will be cancelled.
- your chosen super account will retain its investment options and future contribution strategy. This means that the super balance transferred to your chosen super account will be invested according to the future contribution strategy of your chosen super account. Your additional super account(s) will close, and all other investment and contribution strategies in your closed additional super account(s) will no longer apply.
- When one or more of your additional super account(s) are invested in Member Direct, we may need to sell down the investments and close the Member Direct account(s) before we can merge the additional super account(s) into your chosen super account. If this is the case, we'll contact you before we close the Member Direct account(s).

Claiming a tax deduction for super contributions

You might be able to claim a tax deduction for any personal contributions you've made to your super. To claim a tax deduction for personal super contributions, you must send us a Notice of intent to claim a tax deduction form before you transfer any part of your super account to another super account or close your account.

We can't accept your Notice of intent to claim a tax deduction form after a request for merge to another super account has been processed.

To get a claim form or find out more, go to australiansuper.com/ClaimDeduction

3 Combining your cover (if any) before merging your AustralianSuper super accounts

Before merging your super accounts, you can choose to combine the insurance cover (if any) in your additional super account(s) with the cover in your chosen super account. Once your cover is combined, your super account(s) will be merged and your additional super account(s) will be closed.

You can combine some or all of the cover in your additional account(s) by marking Option 1 or 2 below and providing your account numbers (if needed). If you don't have any cover or don't want to combine cover in any of your super accounts, mark Option 3 below.

Option 1: Please combine all my cover in all my additional super account(s) to the chosen super account I've nominated in section 2.

Option 2: Please combine my cover in the additional super account(s) listed below, to my chosen super account.

| Additional account number | |
|---------------------------|---|
| Death cover | Total & Permanent Disablement (TPD) cover |
| Additional account number | |
| Death cover | Total & Permanent Disablement (TPD) cover |

Option 3: Please do not combine any insurance cover I may have in my super accounts.

When you combine the insurance cover you have in your additional account(s) with the cover in your chosen super account, please note that:

- any Income Protection in your other super account(s) can't be combined with the Income Protection in your chosen super account, and
- any Income Protection in your additional super account(s) that you've applied for or made changes to, such as a higher amount of Income Protection, shorter waiting period or a longer benefit payment period and work ratings that are more beneficial to you, will be transferred and applied to the Income Protection in your chosen super account. A shorter waiting period and a longer benefit payment period cost more.

Important note

When you combine your cover to your chosen super account, your cover amount and your insurance costs may change. You can check what the cost of any combined cover (except for AustralianSuper Select) will be by using the insurance calculator at **australiansuper.com/InsuranceCalculator**

The Death and/or TPD cover from your additional super account(s) will be combined to the cover in your chosen super account as extra (fixed) cover (rounded up to the next \$1,000). If you don't combine your insurance cover in your additional super account(s) will stop when your super accounts are merged. If you want that cover again you'll need to apply for it and provide health evidence for the Insurer¹ to consider. To check what cover you have in each of your super accounts, use the AustralianSuper mobile app or log into your account at **australiansuper.com**, go to *Insurance*, then *Manage insurance*.

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

4 Sign this form

By signing this request form I acknowledge that:

- I've read the information provided on this form.
- I understand that when I give consent to merge my additional super account(s) to my chosen super account:
 - my additional super account(s) will close and insurance cover (if any) on those accounts that I don't request to combine to my chosen super account will stop.
 - my chosen super account will retain its beneficiary nomination(s). All other beneficiary nominations in my closed additional super account(s) will be cancelled.
 - my chosen super account will retain its investment options and future contribution strategy. This means that super balance transferred to my chosen super account will be invested according to the future contribution strategy of my chosen super account. All other investment and contribution strategies in my closed additional super account(s) will no longer apply.
 - where applicable, I've checked my insurance cover including the insurance cost in my chosen super account and understand that my cover amount and insurance cost will change if I merge my super accounts and request to combine my cover.
- I understand that if I'm invested in Member Direct with my additional super account(s), my Member Direct account(s) may need to be closed before the merge can take place; if this is required, AustralianSuper will contact me to discuss the available options to merge my accounts.
- I understand if I combine the insurance cover I have in my additional account(s) with the cover in my chosen super account:
- any Income Protection in my additional super account(s) cannot be combined with the Income Protection I have in my chosen super account, and
- any Income Protection in my additional super account(s) that I've applied for or made changes to, such as a higher amount of Income Protection, shorter waiting period, or a longer benefit payment period will be transferred and applied to the Income Protection in my chosen super account. A shorter waiting period and a longer benefit payment period cost more.
- If I combine the Death and/or TPD insurance cover in my additional super account(s) to my chosen super account, the cover from my additional super account(s) will be combined as extra (fixed) cover rounded up to the next \$1,000. With fixed cover the amount of cover I have stays the same (unless I change it) and generally the cost of it will increase as I get older. Fixed TPD cover reduces gradually from age 61 to zero at age 65.
- If the cover I've combined was limited cover, this cover will remain limited cover at AustralianSuper, until the limited cover period expires.
- If any other exclusions or special conditions applied to my cover, these conditions will continue to apply to my combined amount of cover.
- I understand that if I choose to keep one or more AustralianSuper account(s) and insurance cover open, I will continue to pay administration fees and insurance costs for all my open super account(s) and cover.
- I can change or cancel my cover at anytime, by logging into my account or completing the *Change your insurance* form at **australiansuper.com/InsuranceForms** or at **australiansuper.com/select** if I'm a member of AustralianSuper Select.
- I've read the Privacy Collection Statement below and I understand how AustralianSuper will use my personal information. To the best of my knowledge, the information I have provided on this form is correct.

You need to sign here

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| Print name | | | | | | | | | | | | | | | | | | | |
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Please scan and upload your completed and signed form via **australiansuper.com/upload-document** Or you can post this completed and signed form to AustralianSuper at GPO Box 1901, MELBOURNE VIC 3001.

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 GPO Box 1901, Melbourne, Victoria 3001, collects your personal information (PI), including sensitive information to operate, and administer your super account (including insurance) or retirement income account, improve our products and services and keep you informed. If we can't collect your PI we may not be able to provide these services. PI is collected from you but sometimes from third parties like your employer and your financial adviser (if applicable). We will only share your PI where necessary to perform our activities with our administrator (Australian Administration Services Pty Ltd, being a part of MUFG Pension & Market Services Holdings Ltd), our insurer (TAL Life Limited, ABN 70 050 109 450, AFSL 237848), our contact centre provider (Concentrix Services Pty Ltd), 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 and, where applicable to your circumstances, by third party service providers of your financial adviser.

Our Privacy Policy details how to access and change your PI, as well as our privacy complaints process. For complete details go to **australiansuper.com/privacy** or call us on **1300 300 273**.

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