

# Combine your super into AustralianSuper

Request to transfer whole or partial balance of super account to AustralianSuper



Please complete in pen using CAPITAL letters and print  to mark boxes where applicable. Form must be completed in full. Read the Privacy Collection Statement on this form to see how AustralianSuper uses your personal information. This form can't be used to transfer self managed super account balances to your AustralianSuper account.

To arrange a rollover from your self managed super account, please contact the administrator of your account. They will need to send us a Rollover Benefit Statement and a cheque payable to AustralianSuper.

## STEP 1. FILL IN YOUR PERSONAL DETAILS

|   |                                     |                                     |                                     |                                     |                                     |
|---|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Last name   | Mr                                  | Ms                                  | Mrs                                 | Miss                                | Dr                                  |
| <input type="text"/>  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| First name  | Date of birth                       |                                     |                                     |                                     |                                     |
| <input type="text"/>  | <input type="text"/>                | <input type="text"/>                | <input type="text"/>                | <input type="text"/>                | <input type="text"/>                |
| Other/previous names  | <input type="text"/>                | <input type="text"/>                | <input type="text"/>                | <input type="text"/>                | <input type="text"/>                |
| Street address  | <input type="text"/>                |                                     |                                     |                                     |                                     |
| Suburb  | State                               | Postcode                            |                                     |                                     |                                     |
| <input type="text"/>  | <input type="text"/>                | <input type="text"/>                | <input type="text"/>                | <input type="text"/>                | <input type="text"/>                |
| Previous street address (if details with your FROM fund are different to those above) | <input type="text"/>                |                                     |                                     |                                     |                                     |
| Suburb  | State                               | Postcode                            |                                     |                                     |                                     |
| <input type="text"/>  | <input type="text"/>                | <input type="text"/>                | <input type="text"/>                | <input type="text"/>                | <input type="text"/>                |
| Male  | Female                              | Email                               |                                     |                                     |                                     |
| <input type="checkbox"/>  | <input type="checkbox"/>            | <input type="text"/>                |                                     |                                     |                                     |
| Telephone (business hours)  | Telephone (after hours)             | Mobile                              |                                     |                                     |                                     |
| <input type="text"/>  | <input type="text"/>                | <input type="text"/>                |                                     |                                     |                                     |

## STEP 2. PROVIDE SUPER ACCOUNT DETAILS

|                                  |                                  |
|----------------------------------|----------------------------------|
| <b>FROM:</b> Fund's name         | <b>TO: AustralianSuper</b>       |
| <input type="text"/>             | Member number                    |
| <input type="text"/>             | <input type="text"/>             |
| Fund phone number                | Phone number <b>1300 300 273</b> |
| <input type="text"/>             | ABN <b>65 714 394 898</b>        |
| Member or account number         | USI <b>STA0100AU</b>             |
| <input type="text"/>             |                                  |
| Australian Business Number (ABN) |                                  |
| <input type="text"/>             |                                  |
| USI*                             |                                  |
| <input type="text"/>             |                                  |

\* Unique Superannuation Identifier (USI)

## STEP 3. IS THIS A WHOLE OR PARTIAL BALANCE ROLLOVER?

Whole – I'd like to transfer the whole balance of this account. This means you're asking us to close your other super account.

Partial – I'd like to transfer a nominated amount: \$  ,  ,  .00

If you have more than one account with this fund, or want to combine your super from multiple funds, you can photocopy this form. You must complete a separate form, with original signature for each account you wish to combine into your AustralianSuper account.

## STEP 4. YOUR TAX FILE NUMBER

### Use my Tax File Number (TFN) to process my super rollover.

Enter your TFN here

By giving us your TFN, you are authorising us to give this information to your other super fund. They'll confirm your ID with the Australian Tax Office.

## STEP 5. SIGN THIS FORM

By signing this request form I'm making the following statements:

- I declare I've fully read this form and the information completed is true and correct.
- I'm aware I may ask my super 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 such as insurance cover, and do not require any further information.
- I discharge the super provider of my FROM fund of all further liability in respect of the benefits paid and transferred to AustralianSuper.

- I authorise AustralianSuper (or its agents) to contact my other super fund regarding this request to combine my super from that fund into my AustralianSuper account only.
- I'm aware that once my completed form is received by AustralianSuper, it will usually be processed within three business days.
- I've read the Privacy Collection Statement below and I understand how AustralianSuper will use my personal information.

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

### You need to sign here



Date

### Important information

1. You can't nominate a balance transfer date. The balance transfer will start within three business days of the date we receive your completed application.
2. Remember to check if your old fund charges exit fees and that you no longer need the insurance cover provided by your old fund (if any).
3. If you're making a whole balance transfer, check any remaining employer contributions have been received and no future payments will be made into your FROM account.
4. This form doesn't:
  - transfer super benefits if you don't know where your super is
  - transfer benefits from multiple funds on one form – you must use a separate form for each fund you wish to transfer
  - change the fund to which your employer pays your contributions

- open a new super 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.

### Providing your TFN

The law allows super funds to ask for TFNs. You don't have to give us your TFN but it's a good idea if you do. If you don't, you'll pay more tax on super benefit payments and before-tax contributions, and we won't be able to accept after-tax contributions from you. It will also make finding lost super easier.

We follow laws on how we can use your TFN, which may change. If we transfer your super to another fund, we'll give your TFN to the other fund unless you tell us not to in writing. For more about how we use your TFN, go to [australiansuper.com/RefTFN](http://australiansuper.com/RefTFN)

### 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](http://australiansuper.com/CollectionStatement) and [australiansuper.com/privacy](http://australiansuper.com/privacy) or call us on 1300 300 273.



To combine other super accounts into AustralianSuper, go to [australiansuper.com/combine](http://australiansuper.com/combine)