

## Combine your super

Request to transfer (rollover) the whole or a partial balance of your other super account to AustralianSuper



Please consider doing this transaction online — it will be faster and more secure. Simply login to your account at [australiansuper.com/login](https://australiansuper.com/login) and follow the prompts. First-time users may need to register at [australiansuper.com/register](https://australiansuper.com/register) Or you can complete this form and upload a scanned or soft (digital) copy of it via [australiansuper.com/upload-document](https://australiansuper.com/upload-document)

If you're completing this in pen use CAPITAL letters and print (X) to mark boxes where applicable. Form must be completed in full. To combine super from multiple accounts, you'll need to complete a separate form for each account you wish to combine. Alternatively you can combine multiple accounts online at [australiansuper.com/combine](https://australiansuper.com/combine)

## 1 Fill in your personal details

|   |                          |                          |                          |                          |                          |                          |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Last name   |                          | Mr                       | Mrs                      | Ms                       | Miss                     | Dr                       |
| <input type="text"/>  |                          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| First name/s  |                          | Date of birth            |                          |                          |                          |                          |
| <input type="text"/>  |                          | <input type="text"/>     |                          |                          |                          |                          |
| Other/previous names  |                          |                          |                          |                          |                          |                          |
| <input type="text"/>  |                          |                          |                          |                          |                          |                          |
| Street address  |                          |                          |                          |                          |                          |                          |
| <input type="text"/>  |                          |                          |                          |                          |                          |                          |
| Suburb  |                          | State                    |                          | Postcode                 |                          |                          |
| <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"/>     |                          |                          |
| Telephone (business hours)  |                          | Telephone (after hours)  |                          | Mobile                   |                          |                          |
| <input type="text"/>  |                          | <input type="text"/>     |                          | <input type="text"/>     |                          |                          |
| Male  | Female                   | Email                    |                          |                          |                          |                          |
| <input type="checkbox"/>  | <input type="checkbox"/> | <input type="text"/>     |                          |                          |                          |                          |

## 2 Provide super account details

## FROM:

|                                  |  |
|----------------------------------|--|
| <input type="checkbox"/>         | <b>Other super fund</b>                |
| Fund name                        |  |
| <input type="text"/>             |  |
| Fund phone number                | Member or account number               |
| <input type="text"/>             | <input type="text"/>                   |
| Australian Business Number (ABN) | Unique Superannuation Identifier (USI) |
| <input type="text"/>             | <input type="text"/>                   |
| <input type="checkbox"/>         | <b>Self-managed super fund (SMSF)</b>  |
| SMSF name                        |  |
| <input type="text"/>             |  |
| Australian Business Number (ABN) |  |
| <input type="text"/>             |  |
| Electronic Service Address (ESA) |  |
| <input type="text"/>             |  |

## TO: Fund name

AUSTRALIANSUPER

## Member number

## Phone number

1 3 0 0 3 0 0 2 7 3

## Australian Business Number (ABN)

6 5 7 1 4 3 9 4 8 9 8

## Unique Superannuation Identifier (USI)

S T A 0 1 0 0 A U

3 Is this a whole or partial balance transfer?

- ☐ 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

Before combining (consolidating) super from your other super account, you should consider any fees and costs that may apply and the effect a transfer may have on benefits in your other fund such as insurance cover. If you want to transfer insurance cover you have with your other super account to AustralianSuper, you'll need to transfer it before you combine your super. Download an *Insurance transfer* form at [australiansuper.com/InsuranceForms](https://australiansuper.com/InsuranceForms)

#### 4 Your tax file number

- ☐
- Use my Tax File Number (TFN) to process my super transfer.

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 Taxation Office. It's optional to provide your Tax File Number (TFN) but there are several advantages if you do. See 'Providing your TFN' below for more information.

5 Sign this form

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

- 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.
- To the best of my knowledge, the information I've provided on this form is correct.
- If I've provided my email address and/or phone number in this form and I have no existing communication preferences on file with AustralianSuper, 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 account online, SMS, mobile app or phone, as appropriate and in accordance with AustralianSuper's Privacy Policy. Otherwise, my current communication preferences for my account will remain unchanged. I understand I can change my communication preferences at any time by calling AustralianSuper on **1300 300 273** or through the Communication preferences section of my account online.

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

Sign here

Date \_\_\_\_\_

|   |   |   |   |   |   |   |   |
|---|---|---|---|---|---|---|---|
| D | D | M | M | Y | Y | Y | Y |
|---|---|---|---|---|---|---|---|

Print name

[illegible]

## 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. If you want to transfer any insurance cover you have with your other super fund to AustralianSuper, you'll need to transfer it before you combine your super. Download an Insurance transfer form at [australiansuper.com/InsuranceForms](https://australiansuper.com/InsuranceForms)
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

We're authorised under super law to collect, use and disclose your Tax File Number (TFN). It's optional to provide your TFN, but if we have it, we'll be able to accept all types of contributions from you, you won't pay more tax than you need to, and it'll be easier to find your super. If you transfer your super to another fund, we'll give them your TFN unless you tell us not to in writing. Visit [australiansuper.com/TFNGuide](https://australiansuper.com/TFNGuide) for more details.

## 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) 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 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 [austriansuper.com/privacy](https://www.austriansuper.com/privacy) or call us on **1300 300 273**.



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