

Super transfer



Sunsuper Pty Ltd ABN 88 010 720 840 AFSL No. 228975 Trustee of the Sunsuper Superannuation Fund
RSE Licence No. L0000291 RSE Registration No. R1000337

Call: 13 11 84
GPO Box 2924 Brisbane Qld 4001
www.sunsuper.com.au

Important: Please provide us with as much information as possible. Use **BLOCK** letters and black ink when completing this form and ensure it is signed and dated. If you transfer money from more than one superannuation fund to Sunsuper, please complete a separate form for each fund. You can use photocopies or contact us for extra forms. Note: You should take care before cancelling existing arrangements. You need to be aware of any existing penalties that may apply and the effect on any existing life insurance cover.

Member details

* Denotes mandatory fields

Member number <small>(if already a member)</small>	<input type="text"/>	Office use only	<input type="text"/>
Title	<input type="text"/>	First name *	<input type="text"/>
Middle name/s *	<input type="text"/>	Last name *	<input type="text"/>
Date of birth <small>(dd/mm/yyyy)</small> *	<input type="text"/>	Gender *	<input type="text"/>
Street address / PO Box *	<input type="text"/>		
Suburb / Town *	<input type="text"/>	State *	<input type="text"/>
		Postcode *	<input type="text"/>
Email address	<input type="text"/>		
Home * phone number	<input type="text"/>	Daytime * phone number	<input type="text"/>

Details of other fund (You can also attach a copy of your previous fund statement if it's handy.)

Fund name *	<input type="text"/>	Fund phone number *	<input type="text"/>
Member number *	<input type="text"/>		
Street address / PO Box	<input type="text"/>		
Suburb / Town	<input type="text"/>	State	<input type="text"/>
		Postcode	<input type="text"/>

Are your details different in the other fund?

Note: If you have changed your name you will need to provide a linking document. Please read the **Important Information - Change of Name** section at the back of this form for a list of acceptable documents.

Name	<input type="text"/>		
Street address / PO Box	<input type="text"/>		
Suburb / Town	<input type="text"/>	State	<input type="text"/>
		Postcode	<input type="text"/>

Proof of identity

Please read the **Important Information - Proof of Identity** section at the back of this form before completing.

The person who is authorised to certify documents must sight the original and the copy to make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (eg Justice of the Peace, Australia Post Employee, etc) and date.

I have attached a certified copy of my driver's licence or passport **OR**

I have attached certified copies of **both**:

Birth / Citizenship Certificate or Centrelink Pension Card **AND**

Centrelink payment letter or Government notice (<1 year old) with name and address

Tax file number (TFN) details

I agree to provide my TFN

Yes

My TFN is

No

Under the *Superannuation Industry (Supervision) Act 1993*, your superannuation fund is authorised to collect your TFN, which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change. The trustee of your superannuation fund may disclose your TFN to another superannuation provider, when your benefits are being transferred, unless you request the trustee of your superannuation fund in writing that your TFN not be disclosed to any other superannuation provider.

It is not an offence not to quote your TFN. However giving your TFN to your superannuation fund will have the following advantages (which may not otherwise apply):

- your superannuation fund will be able to accept all types of contributions to your account/s;
- the tax on contributions to your superannuation account/s will not increase;
- other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your superannuation benefits; and
- it will make it much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

Declaration - please read the Important Information page before signing

By signing this request form I am making the following statements.

- I authorise Sunsuper to arrange with the fund nominated above to transfer my benefit to Sunsuper.
- I discharge the Trustee of my previous superannuation fund from any further liability in respect of any amount once the benefit has been transferred to Sunsuper.
- I approve the deduction of transfer fees by my previous superannuation fund (if any) from the benefit transferred.
- I understand Sunsuper may be required to deduct tax from any untaxed portion of the payment being transferred.
- I request any contributions received after payment of my benefit be transferred to Sunsuper.
- I consent to the information on this form being provided to my previous fund for the purposes of completing this transfer to Sunsuper.
- I have considered the fees and charges, effect on insurance cover, and the implication to my benefit entitlement, prior to rolling over my benefit. I do not require further information and authorise the rollover to proceed.

Full name (print in BLOCK letters) *

Sign here *

Date *

(dd/mm/yyyy)

Checklist

We will process your transfer as soon as we can. However, it is important to make sure you give us all of the information and documents we need to do this.

Have you signed and dated this form?

Have you attached your certified Proof of Identity documents including any linking documents if applicable?

Have you completed all of the mandatory fields on the form?

Have you read the important information section?

Important Information



Proof of identity

From 1 July 2007 you will need to provide us with acceptable documentation with this *Super Transfer* form to prove you are the person to whom the superannuation entitlements belong, prior to us processing your transfer.

Acceptable Documents

The following documents may be used.

either

One of the following documents only:

- Drivers licence issued under State or Territory law
- Passport

or

One of the following documents: <ul style="list-style-type: none">• Birth certificate or birth extract• Citizenship certificate issued by the Commonwealth• Pension card issued by Centrelink that entitles the person to financial benefits	and	One of the following documents: <ul style="list-style-type: none">• Letter from Centrelink regarding a Government assistance payment• Notice issued by Commonwealth, State or Territory, Government or Local Council within the past twelve months that contains your name and residential address. For example: Tax Office Notice of assessment or Rates notice from the local council.
--	------------	---

Change of name

If you have changed your name or are signing on behalf of the member, you will need to provide a linking document. A linking document is a document that proves a relationship exists between two (or more) names. Failure to provide acceptable documents will prevent us from updating your details.

The following table contains information about suitable linking documents.

Purpose	Suitable linking documents
Change of name	Marriage Certificate, deed poll or change of name certificate from the Births, Deaths, and Marriages Registration Office
Signed on behalf of the member	Guardianship papers or Power of Attorney

Certification of personal documents

All copied pages of **ORIGINAL** proof of identification documents (including any linking documents) need to be certified as true copies by any individual approved to do so.

The following can certify copies of the originals as **true and correct** copies:

- A permanent employee of Australia Post with 5 or more years of continuous service
- A finance company officer with 5 or more years of continuous service (with one or more finance companies)
- An officer with, or authorized representative of, a holder of an Australian Financial Services Licence (AFSL), having 5 or more years of continuous service with one or more licensees
- A notary public officer
- A police officer
- A registrar or deputy registrar of a court
- A Justice of the Peace
- A person enrolled on the roll of State or Territory Supreme Court or the High Court of Australia, as a legal practitioner
- An Australian consular officer or an Australian diplomatic officer
- A judge of a court
- A magistrate, or
- A Chief Executive Officer of a Commonwealth court

Please return this form (and if possible a copy of a statement from your other fund) to Sunsuper, GPO Box 2924 Brisbane Qld 4001.

We are committed to respecting the privacy of the personal information you give us. Our formal Privacy Policy sets out how we do this. If you would like a copy of Sunsuper's Privacy Policy, please let us know. We have also published our Privacy Policy on our website at www.sunsuper.com.au.

Have you got super all over the place?

With Sunsuper you can bring all your super together and save yourself extra fees and hassles.

A lot of Australians have a number of different super accounts from having worked in a number of different jobs. Often this means lots of little accounts with different super funds. It also means lots of different fees to pay, and lots of paperwork to keep track of too.

It's simple. All you need to do is fill out the *Super transfer* form and we'll do the rest for you. You will need a separate form for each fund you want to transfer money from.

Your money will be together in one place, easy to find and easy to manage. Simple.

Important information

When can I use this form?

You can only use this form if you want to transfer your entire account balance from another super fund and no more money is going to be paid into that fund for you.

If super will still be paid to that account or, if you only want to transfer part of your money in that fund to Sunsuper, you will need to contact that fund to arrange this.

You can still transfer some of this super to Sunsuper, but unfortunately we can't organise that for you with this form.

Two things to be aware of

1. If you provide us with all of the requirements noted in the checklist, this transfer could take up to 30 days depending on your other fund.
2. You should make sure you understand any impact this request may have on insurance cover you hold with your other fund.

What will this cost you?

We won't charge you any fees to arrange and process this transfer. However, some funds may charge you a fee to release your money. You can check this with your other fund.

Information for other fund.

Sunsuper ABN: 98 503 137 921

Sunsuper SFN: 150 374 940

SPIN: SSR 0100 AU

Sunsuper became a Regulated Superannuation Fund within the meaning of the *Superannuation Industry (Supervision) Act 1993* on 1 July 1994, has not received a notice of non-compliance from the Australian Prudential Regulation Authority, and accepts transferred and rolled over benefits of any amount.

This notice is issued for the purpose of:

- Section 25 of the *Superannuation Guarantee (Administration) Act 1992*,
- Section 136AB of the *Fringe Benefit Tax Assessment Act 1986*, and
- Sections 290 - 60 and 290 - 75 of the *Income Tax Assessment Act 1997*.

All cheques should be made payable to Sunsuper and sent to GPO Box 2924 Brisbane Qld 4001. Please provide a Rollover Benefits statement or another form that provides details of the rollover.

If you have any questions please contact our Customer Service Hotline on

13 11 84 between 8.00am and 6.30pm, Monday to Friday.

General Advice Warning: This letter contains general information only. Any advice does not take into account your personal objectives, financial situation or needs. Accordingly you should consider the appropriateness of any advice having regard to your personal objectives, financial situation and needs before acting on that advice. A copy of the Product Disclosure Statement can be obtained by calling 13 11 84. You may wish to speak to an authorised financial planner to help you determine the best superannuation strategy for your needs.