

Rollover your super into Sunsuper



This form is only for whole (not part) balance transfers.

Important: Use BLOCK letters and dark ink when completing this form and ensure it is signed and dated. If you are transferring money from more than one superannuation fund to Sunsuper, please complete a separate form and provide certified proof of identity documents for each fund. You can photocopy this form and sign each copy or download extra forms from sunsuper.com.au.

*Denotes mandatory fields.

Call 13 11 84

Web sunsuper.com.au

Mail Reply Paid 2924 Brisbane Qld 4001



Use our online rollover tool

Visit sunsuper.com.au/onlinerollover to use our rollover tool and in just 5-10 minutes you'll have the forms you need to combine your accounts.

OFFICE USE ONLY

TRANSFER

Member number
if already a member

1 Your details

Given names*

Last name*

Date of birth (dd/mm/yyyy)* Gender* Male Female

Street address / PO Box*

Suburb / Town*

State* Postcode*

Home phone* Daytime phone*

Preferred email address

Tax file number (if you have it)

Other information that will help us:

Your previous address (If your address held by your other super fund is different to your current address, please supply your previous address details below.)

State Postcode

Other / previous name? (If your name held by your other super fund is different to your current name you will need to supply a certified copy of your *Marriage certificate, Change of name certificate, Deed poll* or other document satisfactory to us).

Given names

Last name

2 Details of the other fund you want to rollover into Sunsuper

Super fund name*

Fund address (if you have it)

Fund contact phone (ABN) Australian Business Number*

If you have multiple account numbers with this fund, you must complete a separate form for each account you wish to transfer.

Please attach a copy of your previous fund statement if you have one.

Approximate balance of other fund*

\$

Member number (if you have it)

Don't know the details of your other funds? Let our online rollover tool find them for you at sunsuper.com.au/onlinerollover.

3 Proof of identity* (This is to prove you are the person who owns the money you are trying to transfer.)

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) or local council notice (<3 months old) with name and address

All copies of ORIGINAL proof of identity documents MUST be certified as true copies by someone approved to do so (see *Who can certify?* on page 2).

4 Checklist* (Make sure you give us all the information and documents we need to process your transfer.)

- Have you signed and dated the form?
- Have you completed all the mandatory fields?
- Have you provided certified copies of your proof of identity documents?
- Have you considered where your future employer contributions will be paid?
- Have you read page 2 of this form?
- Have you completed a separate form for each account you wish to transfer?

5 Declaration By signing this request form I am making the following statements:

- I declare I have fully read this form and the information completed is true and correct.
- I am aware I may ask my superannuation provider for information about any fees or charges that may apply, about the effect on my insurance cover or any other information about the effect this transfer may have on my benefits, and do not require any further information.
- I discharge the Trustee of my previous superannuation fund from any further liability in respect to any amount once the benefit has been paid and 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 authorise Sunsuper and the transferring fund nominated above to arrange the total balance transfer for my superannuation benefit to Sunsuper.

Signature* Please read the information on page 2 before signing

Date* (dd/mm/yyyy)

Please tick if you're signing on behalf of a member aged under 18 or have a Power of Attorney. Please provide a certified copy of the Power of Attorney documentation or Guardianship papers.

Parent/guardian

Once you fill out this form, review the checklist above and return the form and your certified proof of identity to: **Sunsuper Reply Paid 2924 Brisbane Qld 4001**

Rollover your super into Sunsuper information

Have more than one super fund? If you do, you could be paying double the fees and dealing with twice the paperwork.



Use our online rollover tool

Visit sunsuper.com.au/onlinerollover to use our rollover tool and in just 5-10 minutes you'll have the forms you need to combine your accounts.

To bring all of your super together at Sunsuper, just follow these steps...

1

Find out if you have any other super funds and make a note of the super fund name.

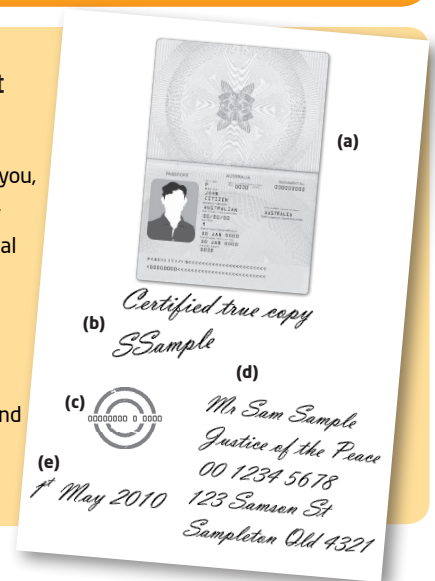
2

Complete the form overleaf. Follow the instructions and post the completed form to us along with your certified proof of identity (and if possible a copy of a statement from your other fund) to:

Sunsuper
Reply Paid 2924
Brisbane Qld 4001

This example shows how your proof of identity document should look:

- Copy of the document that identifies you, (i.e. your driver's licence or passport),
- Displays 'Certified true copy of original document' written or stamped and signature of authorised person,
- Authorised person's stamp and registration number (if applicable),
- Name, qualification, phone number and address of authorised person, and
- Date of authorisation.



Who can certify?

- Justice of the Peace (including Commissioner for Declarations)
- Police Officer
- One of the following with 5 or more years of continuous service
 - Australia Post permanent employee
 - Financial Institution Officer e.g. bank employee
 - Australian Financial Services Licensee, authorised representative or officer.

For a full list of who can certify, please refer to the *Proof of identity requirements* fact sheet on our website.

What do we mean by certified?

We understand you'll want to provide us with copies of your ID documents, rather than the originals. That's fine, but you must have them 'certified'. This means the certifier must:

- Sight the original and the copy to make sure both documents are identical, and
- Write or stamp 'certified true copy of original document' on each page, and
- Sign and print their name, qualification (e.g. Justice of the Peace, Australia Post permanent employee), and the date on each page of the document.

Three things you should be aware of

- If you don't provide us with all of the information requested, the form may be returned to you.
- Once you provide all the required information, your other fund has up to 30 days to process your request from receipt date.
- You should make sure you understand any impacts this request may have on exit/withdrawal fees and insurance cover you hold with your other fund.

How can I get my employer to pay into Sunsuper for me?

If you're eligible to choose your own fund and your employer does not pay into Sunsuper for you at the moment, but you would like them to in the future, give your employer the *Selecting Sunsuper* form from our website with your Sunsuper details.

What happens if I do not quote my tax file number (TFN)?

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.

Information for other fund: Sunsuper Superannuation Fund ABN: 98 503 137 921 SFN: 150 374 940 SPIN: SSR 0100 AU Sunsuper Superannuation Fund 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 **Reply Paid 2924 Brisbane Qld 4001**. Please provide a *Rollover benefits statement*. If you have any questions please call us on **13 11 84** between 8.00am and 6.30pm, Monday to Friday.

Sunsuper Pty Ltd (ABN 88 010 720 840 AFSL No. 228975), trustee of the Sunsuper Superannuation Fund (ABN 98 503 137 921) **General Advice Warning:** This form 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* (PDS) can be obtained by calling 13 11 84 or by visiting sunsuper.com.au. You should consider the PDS before deciding whether to acquire or to continue to hold this product. You may wish to speak to an authorised financial planner to help you determine the best superannuation strategy for your needs. 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 sunsuper.com.au.