

Combine your super into Sunsuper



Did you know you can combine your super online?

Simply visit sunsuper.com.au/rollovertool and we'll do the searching for you.

Important: If you're not yet a member of Sunsuper please ensure you read and understand your Duty of Disclosure located in the *Sunsuper for life Insurance guide*, or sunsuper.com.au/dutyofdisclosure

Please provide us with as much information as possible and ensure your form is signed and dated.

*DENOTES MANDATORY FIELD.

13 11 84 sunsuper.com.au
Reply Paid 2924 Brisbane Qld 4001

Member number
if already a member

1 Personal details

Title	First name*	Middle name
<input type="text"/>	<input type="text"/>	<input type="text"/>

Last name*	Date of birth (DD/MM/YYYY)*	Gender*
<input type="text"/>	<input type="text"/>	<input type="radio"/> M <input type="radio"/> F

Street Address/PO Box*

Suburb/Town*	State*	Postcode*	Home phone number	Daytime phone number*
<input type="text"/>				

Personal email address	Mobile phone number*
<input type="text"/>	<input type="text"/>

Register me for *Member Online* now. You must provide a valid email address. Details will be forwarded to you.

Note: Unless you have elected to receive printed information, Sunsuper will confirm this change electronically if we can. We'll email or SMS you if you have information to view in *Member Online*. If you would prefer information is posted to you in the future, change your preferences in *Member Online*, the Sunsuper app, or by calling us on 13 11 84.

Residential street address (if the same as above leave blank)*	Suburb/Town*	State*	Postcode*
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Tax file number (TFN) details – Sunsuper can use your TFN to help you bring your super together.

My TFN

Look for other super for me
Tick and we'll use your TFN to search for any other super you may have with other funds or the ATO, to the extent the law allows. If we find money with the ATO, this will normally be transferred automatically to your Sunsuper account. If we find money with other funds, we'll be in touch to help you combine them.

Turn over to learn how you can avoid extra tax by providing your TFN. If you don't provide your TFN, or the other fund is unable to match your details with the ATO, you may be asked for further documentation to verify your identity.

2 Do you have an existing Sunsuper account?

YES I do have an existing Sunsuper account NO Complete this section

I am currently EMPLOYED I am a CASUAL worker or CONTRACTOR I am SELF-employed I am NOT employed

[Go to – Section 3](#)

If you don't already have a Sunsuper account and are not joining Sunsuper through an employer we'll set up an account for you. If eligible you'll receive Death and Total & Permanent Disability Assist insurance cover. Refer to Section 8 of the *Sunsuper for life Product Disclosure Statement (PDS)* at sunsuper.com.au/pds for more information including eligibility, cost and how to change or cancel cover. Your balance will be invested in the Lifecycle Investment Strategy (default option). For more information or to choose from our wide range of investment options visit sunsuper.com.au/pds for a copy of the *Sunsuper for life Investment guide*.

3 Other super account(s) that you want to combine with Sunsuper

Do you have insurance cover with your other fund? You can transfer your cover to Sunsuper before you combine your super. Just complete a *Transfer of insurance cover form* at sunsuper.com.au/insuranceforms. You should not cancel your existing cover until you have received confirmation that your transfer request has been accepted by Sunsuper.

Super fund name*	Member number*	Fund's Unique Superannuation Identifier or product name	Amount to transfer (tick one only)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Whole balance (default) <input type="checkbox"/> Partial amount of \$
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Whole balance (default) <input type="checkbox"/> Partial amount of \$
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Whole balance (default) <input type="checkbox"/> Partial amount of \$
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Whole balance (default) <input type="checkbox"/> Partial amount of \$

[Please continue over page](#)

4 Have your details changed?

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.)

Street Address / PO Box

Suburb/Town

State

Postcode

Have you been known by any other name? (e.g. maiden name)

Other/previous name?

If your name held by your other super fund is different to your name with Sunsuper you will need to change your name with your other fund before you submit this form.

5 Financial adviser

Please communicate with my financial adviser where possible regarding this form. I have attached (or previously provided) a signed third party authority for my financial adviser to access information about my Sunsuper account(s).

Please communicate with my financial adviser about this form via email. I acknowledge email is not a secure form of communication.

Adviser name/Company:

6 Authorisation and declaration Please read the information below before signing

By signing this request form I am making the following statements to combine my super:

- 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 (if any) by my previous superannuation fund 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(s) nominated above to arrange the total or partial balance transfer of my superannuation benefit to Sunsuper.
- I consent to my TFN being disclosed for the purpose of consolidating my accounts.
- I have considered where my employer super contributions (if any) are currently paid.

New members joining Sunsuper without an employer only

- I apply to become a member of Sunsuper and I agree to be bound by the Trust Deed that governs the Fund.
- I apply to open a *Super-savings account*.
- I acknowledge and have read my Duty of Disclosure at [sunsuper.com.au/dutyofdisclosure](https://www.sunsuper.com.au/dutyofdisclosure) and all of my details on this form are correct.
- I have received, read and accept the *Sunsuper for life PDS*. I understand that other important information which forms part of the *PDS* is contained in the *Sunsuper for life guide*, the *Sunsuper for life Insurance guide* and *Sunsuper for life Investment guide* and that the *PDS* should be read in its entirety.
- I understand all the conditions I must meet to be eligible to obtain Death and Total & Permanent Disability Assist insurance cover, as described in Section 4 of the *Sunsuper for life Insurance guide*. I understand conditions will apply before cover starts. I acknowledge insurance cover is provided by an external insurance company.
- By signing this form, I consent to the collection and disclosure of information about me for the purposes shown below.

Important information

Your Privacy – Personal Information Collection Notice

The purpose for which Sunsuper is collecting the information on this form is to provide superannuation benefits and related services for you. This includes processing your application, managing your participation in Sunsuper and ensuring you receive your entitlements. If the information requested is not provided, Sunsuper may be unable to properly administer your benefits and notify you about your entitlements. Sunsuper will normally only use the information you provide on this form for these purposes.

Sunsuper will also use this information to notify you about Sunsuper and other products. Sunsuper does not normally disclose information about members to parties outside the Sunsuper group, except parties contracted to provide services to Sunsuper. This includes but is not limited to the Fund's administration service provider, insurer, auditors and legal advisers.

If you subsequently make a claim for a disablement benefit, the insurer will disclose information about you to medical practitioners and other experts for the purposes of assessing your claim, and may collect information about your disability from these people or from your employer.

Sunsuper also might be required by law to disclose information about you, for example to government bodies such as the Australian Taxation Office and we may disclose information to relevant overseas bodies in various countries, as described in our *Privacy Policy*.

Our *Privacy Policy* sets out how you can access information about your benefit and personal details, correct any information which is inaccurate or out-of-date and information on our privacy complaint process.

We are committed to respecting the privacy of personal information you give us. If you would like a copy of Sunsuper's Privacy Policy, visit [sunsuper.com.au/privacy](https://www.sunsuper.com.au/privacy) or call 13 11 84.

Transfers from New Zealand

Sunsuper does not accept transfers from New Zealand KiwiSaver accounts or rollovers that contain a KiwiSaver component, from an Australian super fund.

Providing your 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.

Member to sign here*

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 name

Parent/guardian signature

 Please return the form to Sunsuper Reply Paid 2924 Brisbane Qld 4001 OR via [sunsuper.com.au/contactus](https://www.sunsuper.com.au/contactus)