

AXA Super Directions for Business

Transfer of UK pension scheme funds

Application form



Super Directions plan details

Plan name

Plan ID

Member number

Your details

Surname (please print)

Given name(s)

Date of birth

Address

Street number and name

Town/Suburb

State

Postcode

Home telephone

Work telephone

Email address

Tax file number (TFN) notification

TFN

Your tax file number is confidential. Before you provide your tax file number we are required to tell you the following:

- 1 Tax file numbers are collected under the Superannuation Industry (Supervision) Act 1993, Retirement Savings Accounts Act 1997, the Privacy Act 1988 and taxation acts (including the Income Tax Act).
- 2 The Trustee and Fund Administrator will only use your tax file number for superannuation purposes, including:
 - Finding or joining together your superannuation benefits
 - Calculating the correct tax on employer termination payments
 - Passing it to the Trustee of another superannuation fund or provider of a retirement savings account when transferring your benefits. You may give us written instructions not to pass it on before any transfer
 - Passing it on to the Australian Taxation Office (ATO):
 - if we have paid you a benefit
 - to report contributions, or
 - if you have unclaimed superannuation money after reaching the Aged Pension age.

These purposes may change in the future as a result of legislative changes.

What happens if I do not quote my TFN

You are not obliged to provide your TFN to your superannuation fund. However, if you do not provide your TFN your fund may be taxed at the highest marginal tax rate plus the Medicare levy on contributions made into your account in the year, compared to the concessional tax rate of 15%. Your fund may deduct additional tax from your account.

If your superannuation fund does not have your TFN, you will not be able to make personal contributions to your superannuation account.

If you are a non resident and you do not provide a TFN, the Trustee must withhold the prescribed rate of tax when paying a lump-sum benefit.

Choosing to quote your TFN will also make it easier to keep track of your superannuation in the future.

QROPS



Be Life Confident

Super Directions plan details

<input type="text"/>	<input type="text"/>	<input type="text"/>
Plan name	Plan ID	Member number

UK pension scheme details

£

Approximate amount of UK pension scheme transfer (if known)

UK pension scheme name

Address

Contact person (if known)

Reference number

I have enclosed an Election Notice –

'Option for an Australian superannuation fund to pay tax on payment from an overseas fund' Yes No

Statutory Declaration

The Trustee of the Super Directions Fund needs you to provide this information to accept your UK pension benefits transfer.

I of

(full name) (address)

in the state of , do solemnly and sincerely declare that the following information is true:

I confirm that on (DD/MM/YYYY), I became a non-UK resident for tax purposes. I also acknowledge that should my residency status change in the future, it is my responsibility to notify the Trustee of this change.

I make this solemn declaration by virtue of the Statutory Declarations Act 1959 (Commonwealth), and subject to the penalties provided by that Act for making false statements in statutory declarations, conscientiously believing the statement contained in this declaration to be true in every particular.

This declaration must be signed in the presence of a person who is authorised to witness a statutory declaration in your State or Territory, such as a Justice of the Peace, Chiropractor, Dentist, Legal practitioner, Nurse, Optometrist, Pharmacist, Physiotherapist or Veterinary surgeon (refer to www.ag.gov.au/statdec for a more complete list).

<input type="text"/>	<input checked="" type="checkbox"/>
Declared at	Signature of declarant
<input type="text"/>	<input type="text"/>
In the state of	On the day of

Print name

<input checked="" type="checkbox"/>	<input type="text"/>
Before me (signature of person before whom the declaration is made)	Qualification

Print name

How to contact us

AXA Customer Service Centre

If you have any questions, please contact your financial adviser or our Customer Service Centre on 133 056.

Send your completed, signed and dated form to: AXA Customer Service, PO Box 14669, MELBOURNE VIC 8001.

