



For the member to complete and sign

This form enables you to roll over your entitlements from other super or rollover funds to your membership:

- Simple Super
- Tailored Super
- Super Directions for Business
- Super Directions for Business Rollover Section

When you provide this completed form to AXA, we will contact your previous fund and arrange the release of your money to be consolidated into your membership. You can photocopy this form if you have multiple super or rollover funds that you wish to rollover into your membership.

Instructions

- Please check with your old fund for details about any exit fees or any restrictions on transfer of your benefit.
- Please check with your financial adviser about any fees that may be charged on entry into your membership.
- Complete all mandatory sections 1, 2 and 4. Please note that the completion of section 3 is optional.
- Payment instructions for the old fund is provided in section 6.
- Please forward this completed form to AXA Australia so that we can arrange for the transfer. Your old fund may contact you if they have further requirements to transfer your benefit.
- You must sign and date the form and provide certified proof of identity documents.
- Please provide your certified proof of identity documents for each rollover/transfer form you submit. The types of identification accepted are explained in the 'Notes to the External rollover/ transfer request' section at the end of this form.

If your investment in your membership comprises a rollover from another institution, the fund paying the rollover may ask you to provide the following information about your AXA rollover investment:

Fund Details – Super Directions Fund

Superannuation Fund Number 4904/989/97
Australian Business Number (ABN) 78 421 957 449
Tax File Number (TFN) 44/910/834

Product Details

Superannuation Product Identification Number (SPIN)

- **Simple Super** NML0438AU
- **Tailored Super** NML0437AU
- **Super Directions for Business for Business** NML0440AU
- **Super Directions for Business for Business Rollover Section** NML0450AU

Providing this information to the old fund will ensure it has all the information necessary to pay the rollover to your membership.

1 Plan/Member details (mandatory section)

Plan name	Plan reference	Member reference (if known)
<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other please specify <input style="width: 50px; height: 20px;" type="text"/>		
		/ /
Surname (please print)	Given name(s)	Date of birth
Street number and name	Town/Suburb	State
Home telephone	Work telephone	Mobile
Email		

External rollover/transfer request

2 Details of old fund and amount to be transferred (mandatory section)

Your latest member statement from your old fund can provide you with the information you need to complete this section.

<input type="text"/>		<input type="text"/>	
Name of old super fund		Membership number	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Street number and name	Town/Suburb	State	Postcode
<input type="text"/>			<input type="text"/>
Contact person in old fund			Contact telephone
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
SFN (if known)	Approximate amount to be transferred to your membership (write 'Balance' if all to be transferred)		
<input type="text"/>	<input type="text"/>		
ABN number	SPIN		

3 Investment choice (optional section)

Before you decide on your investment portfolio(s), please read your product disclosure statement. With the exception of the Super Directions for Business Rollover Section, if your benefit is less than \$1,200 it will be invested in the Protection portfolio. If your benefit is more than \$1,200 and you do not make a choice, your transferred money will be invested as per normal contributions. You may invest up to five portfolios for Tailored Super and Simple Super or up to six portfolios for Super Directions for Business and Super Directions for Business Rollover Section, subject to a minimum of \$1,000 per portfolio.

Investment portfolio(s) for any money transferred from your old fund	% of assets
<input type="text"/>	%
<input type="text"/>	%
<input type="text"/>	%
<input type="text"/>	%
<input type="text"/>	%
<input type="text"/>	%
100%	

4 Member declaration (mandatory section)

- I declare I have fully read this form and the information completed is true and correct.
- I acknowledge I may ask my superannuation 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, and do not require any further information.
- I understand that a transfer of benefits is subject to the terms and conditions of the old fund, including all relevant fees and/or possible loss of any benefits including insurance cover.
- I discharge the superannuation provider of my FROM fund of all further liability in respect of the benefits paid and transferred to my TO fund.
- On receipt of the rollover amount from the old fund, I authorise the Trustee of the Super Directions Fund to invest the rollover amount in accordance with my directions on this form. In the event that I have not provided any directions on this form, I acknowledge that the rollover amount will be invested in accordance with my previous instructions, or if I have not given any instructions in the Multi-manager Balanced portfolio.
- I have provided certified proof identity documents for each rollover/transfer request.
- I request and consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect.

<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Signature of member	Date		

External rollover/transfer request

5 To the Trustee of the old fund

Statement of compliance – Superannuation Industry (Supervision) Act 1993

The Trustee of the Super Directions Fund, N.M. Superannuation Proprietary Limited certifies that:

- the Fund is a Resident Regulated Superannuation Fund under the above Act and holds a valid notice of compliance from the relevant government authority
- to the best of our knowledge and belief throughout the current year of income, the Fund has been administered in accordance with the above Act and Regulations and that we have no reason to believe that the Fund will not continue to comply with the said legislation,
- the Fund is not subject to a direction from the Australian Prudential Regulation Authority which prohibits the Trustee from accepting superannuation contributions in accordance with the relevant legislation.

6 Payment instructions

Please make the cheque payable to the Super Directions Fund.

Send the cheque, this form and the rollover payment details and any surcharge information to:

AXA Customer Service Centre
PO Box 14669
MELBOURNE VIC 8001

Notes to the External rollover/transfer request

Important information

This transfer may close your account (you will need to check this with your old fund).

This form cannot be used to:

- transfer benefits if you don't know where your superannuation is
- transfer benefits from multiple funds on this one form – a separate form must be completed for each fund you wish to transfer superannuation from
- change the fund to which your employer pays contributions on your behalf
- open a superannuation 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.

What happens to my future employer contributions?

Using this form to transfer your benefits will not change the fund to which your employer pays your contributions and may close the account you are transferring your benefits from.

If you wish to change the fund into which your contributions are being paid, you will need to speak to your employer about choice of funds.

For the appropriate forms and information about whether you are eligible to choose the fund to which your employer contributions are made, visit www.superchoice.gov.au or call the Australian Taxation Office on 13 10 20.

Things you need to consider when transferring your superannuation

When you transfer your superannuation, your entitlements under the old fund may cease. You need to consider all relevant information before you make a decision to transfer your superannuation. If you ask for information, your superannuation provider must give it to you. Some of the points you may consider are:

- **Fees** – your old fund must give you information about any exit or withdrawal fees. If you are not aware of the fees that may apply, you should contact your fund for further information before completing this form. The fees could include administration fees as well as exit or withdrawal fees. Your new fund may also charge entry or deposit fees on transfer. Differences in fees funds charge can have a significant effect on what you will have to retire on. For example, a 1 per cent increase in fees may significantly reduce your final benefit.
- **Death and disability benefits** – your old fund may insure you against death, illness or an accident which leaves you unable to return to work. If you choose to leave your old fund, you may lose any insurance entitlements you have. Other funds may not offer insurance, or may require you to pass a medical examination before they cover you. When considering a new fund, you may wish to check the costs and amount of any cover offered.

If you require additional information about superannuation, you may wish to visit the Australian Securities and Investment Commission website www.fido.asic.gov.au.

You can send your completed and signed form with your certified proof of identity documents to either fund.

Completing proof of identity

You will need to provide documentation with this transfer request to prove you are the person to whom the superannuation entitlements belong.

External rollover/transfer request

Acceptable documents

The following documents may be used.

Either

One of the following documents only:

- Driver's licence issued under State or Territory law
- Passport

Or

One of the following documents:

- 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:

- Letter from Centrelink regarding a Government assistance payment
- Notice issued by Commonwealth, State or Territory within the past twelve months that contains your name and residential address. For example:
 - Tax Office Notice of Assessment
 - Rates notice from local council.

Have you changed your name or are you signing on behalf of another person?

If you have changed your name or are signing on behalf of the applicant, you will need to provide a linking document. A linking document is a document that proves a relationship exists between two (or more) names.

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 applicant	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 (see below).

The person who is authorised to certify documents must sight the original and the copy and 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.

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

- a permanent employee of Australia Post with five or more years of continuous service
- a finance company officer with five or more years of continuous service (with one or more finance companies)
- an officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having five or more years 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 a 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.