



For the member to complete and sign.

**Member details**

Mr  Mrs  Miss  Ms  Other please specify

Surname (please print) Given name(s)

Member number

Employer/Plan name Plan reference

**Transfer details**

Transfer amount \$

**Alternative fund details (the new fund)**

Fund name

Fund address

Plan/Membership reference

**Proof of Identity**

Please provide your certified proof of identity documents. The types of identification accepted are explained in the notes at the end of this form.

I have attached a certified copy of my driver 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 (less than 1 year old) with name/address.

**Specific conditions of transfer**

- There is no minimum transfer amount, though \$5,000 must remain within the Fund.
- Only fully vested benefits will be transferred.
- The transferred amount will be deducted proportionately from your portfolio(s).
- Any plan reserve balances will remain in the fund, to be distributed at the plan's annual review.
- The group life sum insured may be affected as a result of the partial transfer.
- The normal withdrawal fee will apply.

**Request and release**

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, or any other information about the effect this payment may have on my benefits, and do not require any further information. I discharge the superannuation provider of all further liability in respect of the benefits paid.

/  /

Member's signature Date

### Important information

This transfer may close your account (you will need to check this with your current 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](http://www.superchoice.gov.au) or call the Australian Tax Office on 13 10 20.

### Things you need to consider when transferring your superannuation

When you transfer your superannuation, your entitlements under that 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 to consider are:

- **Fees** – your current 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 alternative 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 current fund may insure you against death, illness or an accident which leaves you unable to return to work. If you choose to leave your current 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 at [www.fido.asic.gov.au](http://www.fido.asic.gov.au).

### Transfers to self-managed superannuation funds

You may use this form to transfer your benefits to your own self-managed superannuation fund (SMSF).

You should be aware that SMSFs are subject to the same rules and restrictions as other funds, when benefits are to be paid out. In particular, superannuation benefits in SMSFs are required to be 'preserved', meaning they are not generally able to be accessed until you are over age 55 and retired.

The trustee of your current fund may be able to request further information from you about your status as a trustee, or a director of a corporate trustee of your SMSF, if there are multiple transfer requests to your SMSF. Penalties may apply for providing false or misleading information.

### 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.

#### Acceptable documents

The following documents may be used:

#### EITHER

One of the following documents only:

- driver licence issued under State or Territory law, or
- passport.

#### OR

One of the following documents:

- birth certificate or birth extract
- citizenship certificate issued by the Commonwealth, or
- 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, or
- notice issued by Commonwealth, State or Territory within the past 12 months that contains your name and residential address.  
For example:
  - Tax Office Notice of Assessment
  - rates notice from local council.

**Important information** (continued)**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.

<b>Purpose</b>	<b>Suitable linking documents</b>
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 all linking documents) need to be certified as true copies by an approved individual (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 individuals 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 financial 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.