



For the member to complete and sign

This form enables you to roll over your entitlements from other superannuation or rollover funds to the Super Directions Fund, Super Fund Number 4904/989/97. When you provide this completed form to AXA Australia, we will contact your previous fund and arrange the release of your money to be consolidated into your Super Directions Fund. You can photocopy this form if you have multiple superannuation or rollover funds that you wish to roll over into your Super Directions Fund.

Instructions

- Please check with your old fund for details about any exit fees or any restrictions on transferring your benefit to the Super Directions Fund.
- Please forward this completed form to AXA Australia along with your completed application so that we can arrange for the transfer. Your old fund may contact you if they have further requirements to transfer your benefit.
- Please provide your certified proof of identity documents. The types of identification accepted are explained in the 'Notes to the External Rollover/Transfer form' section at the end of this form.
- Please sign and date the form and provide certified proof of identity documents.
- Please complete this application in black pen only using block letters.

When you roll over a superannuation benefit to Super Directions Personal Super Plan, the fund transferring the benefit may ask you for the following information about Super Directions Personal Super Plan for Superannuation Surcharge tax purposes. The information you will need to provide is shown below:

Superannuation Product Identification Number (SPIN) **NML0258AU**
Superannuation Fund Number (SFN) **4904/989/97**
Super Directions Fund ABN **78 421 957 449**

Member details

/

Member number

Mr Mrs Miss Ms Other please specify Date of birth / /

Given name(s) (Please print clearly) Surname

Street number and name Town/Suburb State Postcode

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Home telephone Work telephone Facsimile

Mobile Email address

Old fund and amount to be transferred

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

Name of old fund Membership/policy number

Street number and name Town/Suburb

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State Postcode Contact person in old fund Contact telephone number

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Super fund number (if known) Approximate amount to be transferred to the Super Directions Fund

Continued overleaf

Proof of identity

I have attached a certified copy of my driver's licence or passport

OR

I have attached copies of both:

Birth/Citizenship Certificate or Centrelink Pension Card

AND

Centrelink payment letter or Government notice (<1 year old) with name/address.

Member declaration

- I request that all of the money held in my name in the fund referred to as the old fund, be released to the Super Directions Fund.
- I have provided certified proof of identity documents.
- In authorising the transfer of my benefits from the old fund, the trustee of the old fund is discharged from any further liability in respect of the amount of those benefits upon transfer.

X

Member's signature

| |

Date

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 Pty Ltd, certifies that:

- the Fund is a Resident Regulated Superannuation Fund under the above Act and that
- we have no reason to believe that the Fund will not comply with the above Act and Regulations and that
- 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.

Payment instructions

Please make the cheque payable to **Super Directions – Personal Super Plan**.

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

AXA Australia
Customer Service
PO Box 14330
MELBOURNE Vic 8001

Notes to the External Rollover/Transfer form

Important Information

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

This form can NOT 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. 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 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 you may consider are:

- **Fees** – your **from** 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 **to** 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% increase in fees may significantly reduce your final benefit.
- **Death and disability benefits** – your **from** 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.

Super Directions Personal Super Plan **External rollover/transfer request**

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.

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, Australian 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.

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