

Superannuation

Get it together and consolidate your super

Super consolidation form



If you have had more than one job, chances are you have more than one superannuation policy – which also means you are probably paying more than one set of fees.

You have the option of combining all of your super benefits into a single fund, which means you'll pay only one set of fees, receive one set of paperwork, and have more control over your super investment.

However, in some cases consolidation may not be in your best interests. Please refer to the important information below. We also recommend that you speak to your financial adviser before choosing to consolidate your super.

We've made it super easy for you.

If you decide to consolidate, follow these three steps:

Step 1

Gather your statements

You can find your policy number(s) by checking your old super statements. If you can't find your old statements, contact your former employers who may be able to help you find the companies that hold your old super funds.

Step 2

Fill out the Super consolidation form

Complete steps 1 and 2 of the form on the reverse side of this page. You can photocopy the form if you have more than one super benefit to consolidate, **just remember to sign each form.**

Step 3

Send it back to us

Send your completed Super consolidation form(s) to:
AXA Australia, Reply Paid 14330, MELBOURNE VIC 8001
We'll contact your other super funds on your behalf and consolidate your super benefits into your nominated AXA super account.

Important information

In some cases combining your super accounts may not be in your best interest. You may pay less or more fees and charges overall and you may incur additional exit fees and/or lose benefits (such as insurance cover) from other fund(s) you currently have. This material has been prepared to provide you with general information only. It is not intended to take the place of professional advice and you should not take action on specific issues in reliance on this information. In preparing this information, we did not take into account the financial objectives, situation or particular needs of any particular person. Before making an investment decision, you may want to consider (with or without the assistance of a financial adviser) whether this information is appropriate to your needs, objectives and circumstances. You should obtain a copy of the relevant Product Disclosure Statement (PDS) before making a decision to invest in any financial product. Copies of the PDS can be obtained from your financial adviser or by calling 133 056. Unless specifically stated, the repayment of capital or performance of our products is not guaranteed. This information is provided for persons in Australia only and is not provided for the use of any person who is in any other country.



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This form is a request to roll over your benefit from another superannuation fund to your AXA superannuation fund. You can photocopy the form if you have more than one fund to roll over, but remember to sign each form.

Three steps to put your super in one place.

Step 1 Details of old fund

Complete the details of your old super account

Your most recent member statement from your old fund should provide the information needed to complete this section. Your previous employers may also have these details. You may also want to call the Australian Taxation Office (ATO) Superannuation Information Line on 13 10 20.

Name of old super fund

Membership/policy number

Address (if applicable)

State

Postcode

Approximate amount to be transferred

Your old super fund may require additional information to process your rollover into our fund, such as certified proof of identification, and they may request further paperwork from you.

Transfer funds to your existing AXA member details

AXA superannuation member number

Date of birth

Daytime contact number

Name

Address

Step 2 Member declaration

Sign and date declaration

- The information I have provided above is true and correct.
- I request that all the monies held in my name in the fund referred to above as the old fund, be released to the nominated AXA superannuation account printed above. I authorise AXA to contact the old fund to arrange the transfer and provide the old fund with whatever information is necessary.
- I declare that I have read and understood the Important information overleaf and acknowledge AXA's recommendation that I seek professional financial advice prior to making my decision to consolidate my super.
- 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 benefits.
- I understand that a transfer of benefits is also subject to the terms and conditions of my existing AXA policy, including any fees that may be deducted for rollovers, and the funds will be distributed as per my current investment instructions (if applicable).
- I understand any funds received under \$10 may be returned to my old fund.

Member's signature

Date

Step 3 Return this form

Send this form to: AXA Australia, Reply Paid 14330, MELBOURNE VIC 8001.

axa.com.au

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