

Super rollover form



Part of the
Suncorp Group

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Please use this form if you'd like to consolidate your other super account(s) into your Asteron account.

Please use CAPITAL letters and a black or blue pen.

If you're rolling over more than one super fund into your Asteron account, you'll need to fill in a separate form for each fund. You can either photocopy this form, or download one at www.asteronlife.com.au/forms.

Did you know that you may be able to claim a tax deduction for personal contributions made to your previous super provider? To do this, you'll need to complete and provide a **s290-170 Notice of intent to claim a tax deduction form** to your previous super provider, before you submit a rollover request to us.

Important Note

Please be advised any KiwiSaver sourced benefits as part of your super rollover cannot be accepted at this time.

You MUST provide proof of identity before we can process your rollover. Section 3 explains what you need to do.

If you've got any questions or need any help completing this form, just call us on one of the following numbers.

- If you are a member of Optimum – 1800 819 499
- If you are a member of Optimum Corporate for Standard Pacific – 1800 232 001
- If you are a member of Connelly Temple, Partnership or Workforce – 1300 361 755

Prefer to do things online?



Our online super rollover wizard can make the consolidation process easier, especially if you're rolling over more than one fund. You'll find it at www.asteronsuperrollover.com.au

1. Your details

Account number	<input type="text"/>	(if known)
Fund name* (eg Optimum Corporate Super)	<input type="text"/>	
Title*	<input type="text"/>	
Last name*	<input type="text"/>	
Given name(s)*	<input type="text"/>	
Date of birth*	<input type="text"/>	Tax file number* <input type="text"/>
Daytime phone number*	<input type="text"/>	Mobile <input type="text"/>
Email	<input type="text"/>	

*mandatory field

*Whilst not mandatory providing your tax file number helps us locate and rollover your super easily

2. Details of the fund you'd like to transfer into your account

Your account or member number	<input type="text"/>	<input type="checkbox"/> Full or <input type="checkbox"/> Partial	\$ <input type="text"/>
Name of fund*	<input type="text"/>		
Unique superannuation identifier (USI)	<input type="text"/>		

*mandatory field

3. Lost Super

If you've changed jobs, changed your name or moved house you may have lost super or multiple accounts. If you provide your TFN, we'll do the hard work in finding any lost super and combining it into your new account.

Would you like us to track down any lost super you may have?Yes No

TFN is required for us to complete a super search

By consenting, you authorise SPSL to act on your behalf and use your TFN to search for super accounts using the ATO SuperMatch database, and your accounts held by other super funds. If SPSL finds any lost super held with the ATO, you authorise SPSL to transfer the amount to your Suncorp Everyday Super account. We'll let you know the result of our search in 4-6 weeks.

4. Proof of your identity

You MUST provide proof of your identity, correctly certified, before we can process your rollover.

It may seem a bit of a hassle – but most super funds will require you to do this before releasing your money. After all, your super could be tens of thousands of dollars, so it's for your own protection that your previous fund makes sure you're the rightful owner of the money being transferred.

For most people, the easiest way to provide proof of identity is as follows:

Step 1

Take a photocopy of your current driver's licence (both sides) or current passport (just the page with your photo and personal details) and the original to a post office, police station, Justice of the Peace or bank branch.

Step 2

Ask them to certify your ID.

They'll do this by stamping or writing 'This is a true and correct copy of the original', followed by their signature, name, their qualifications entitling them to be a certifier, and the date.

Step 3

Post the certified copies of your ID back to us with this form. Don't fax or email them – we need to see the certifier's original signature. **Please don't send us the originals of your documents (ie your actual passport or driver's licence).**

Don't have a current driver's licence or passport? Don't worry – there are other ways of giving us proof of your identity. Give us a call and we'll explain your options.

5. Request and authority

- Before signing this form and requesting the transfer of benefits from your previous superannuation fund, you may ask the trustee of that fund to provide you with any information you reasonably require to understand your benefit entitlements. This includes information in relation to any fees or charges which will be incurred as a result of your transfer request and the effect of the transfer, including any change to your insurance cover or available investment options.
- I request that the fund/administration company named in section 2 on this form, transfers my account value to Suncorp Portfolio Services Limited (ABN 61 063 427 958 AFSL 237905 RSE Licence No L0002059) as Trustee of the Suncorp Master Trust (SMT) in relation to my Asteron account mentioned in section 1 of this form.
- Although I understand that I can request any information from my previous fund that I require in order to understand my benefit entitlement, I don't need it to give me any further information.
- The Trustee and the administrator for SMT are acting on my behalf for this transfer and I authorise the release of information relating to my account to them, in order to facilitate and finalise this transfer.
- I authorise the transfer of any contributions which may be received after my benefits have been transferred.
- I understand that in certain circumstances, the Trustee may be required by law to deduct tax from any untaxed portions of amounts transferred.
- I understand that the trustee of my previous fund is discharged from any further liability in respect of any amounts transferred.
- I understand that once the rollover has been completed and funds are transferred to my account, I will no longer be able to claim a tax deduction from my previous super account.
- I understand that my rollover request cannot be processed if there are any KiwiSaver components as part of the funds being transferred across to my account
- Before or at the time I provided any personal information, I read and understood the Trustee's privacy statement available at suncorp.com.au/privacy
- I consent to the Trustee collecting, using and disclosing my personal information including sensitive information, in accordance with the privacy statement.

Instruction to trustee of the previous fund

Please transfer my account value to the Trustee of SMT in relation to my Asteron account noted in section 1 of this form. SMT is a complying superannuation fund and is a resident regulated superannuation fund within the meaning of the Superannuation Industry (Supervision) Act 1993. I've instructed and consented to the Trustee and the administrator for SMT facilitating this transfer on my behalf and I instruct you to provide them with all the relevant information.

The information provided on this form is correct and I consent to the authorities listed above.

Member's signature

X

Date | d | d | / | m | m | / | y | y | y | y |

Checklist

Before sending everything off to us, make sure you've:

- ✓ Filled in all relevant sections of the form
- ✓ Signed and dated it
- ✓ Attached a certified copy of your driver's licence or passport (the version actually signed by the certifier, not a photocopy)
- ✓ Filled out a separate form and separate set of certified documents for each super fund you're rolling over to your Asteron account
- ✓ Given yourself a pat on the back – you've just taken a big step in simplifying your financial life!

Where to send your form(s) and certified ID:

Please send the completed form and identification to: **Asteron Client Services**
Reply Paid 1576
Sydney NSW 2001