

Member Rollover Authorisation Form

ALL SECTIONS MUST BE COMPLETED

PLEASE ☒ NOT ☒

PLEASE USE BLOCK LETTERS



Before signing this form to transfer your superannuation benefits from your previous superannuation fund to your Club Super account, you may ask your previous superannuation fund for all information about your benefits in that fund (including exit or other fees, insurance cover and amounts and the available investment options) that you need to understand the effects of transferring those benefits.

ARE YOU A MEMBER OF CLUB SUPER?

☐ YES ☐ NO If YES, Member No:

Note: if you have changed your name since first becoming a member please attach a certified copy of your Marriage Certificate, Deed Poll or a Statutory Declaration as proof.

PREVIOUS FUND DETAILS

NAME OF PREVIOUS FUND

ADDRESS OF PREVIOUS FUND

PREVIOUS FUND MEMBERSHIP NUMBER

PREVIOUS EMPLOYER NAME

APPROX VALUE OF MY PREVIOUS FUND

TELEPHONE

ABN

UNIQUE SUPERANNUATION IDENTIFIER (USI) OF OTHER FUND OR SPIN

PERSONAL DETAILS

DATE OF BIRTH

GENDER

☐

MALE

☐

FEMALE

TITLE

☐

MR

☐

MRS

☐

MS

☐

DR

SPECIFY IF OTHER

FIRST NAME

MIDDLE NAME

FAMILY NAME

RESIDENTIAL ADDRESS

STREET NUMBER

STREET NAME

SUBURB/TOWN

STATE

POSTCODE

POSTAL ADDRESS (If same as above, write "as above")

PO BOX

SUBURB/TOWN

STATE

POSTCODE

YOUR PREVIOUS ADDRESS

If the address held by your other super fund is different to your current address please supply your previous address details below.

STREET NUMBER

STREET NAME

SUBURB/TOWN

STATE

P/CODE

OTHER/PREVIOUS NAME

Other/previous name?

If the name held by your other super fund is different to your name with Club Super you will need to change your name with your other fund **before** you submit this form.

TAX FILE NUMBER (TFN) & OTHER SUPER

The ATO offers a Super Match facility, which allows Club Super to use your TFN to search for any superannuation you may have in other Funds, or held by the ATO. However, Club Super requires your consent to use your TFN for this purpose.

☐ I consent to allow Club Super to

- (a) use my TFN to search the Australian Taxation Office's (ATO) SuperMatch service for any super I may have;
- (b) transfer any super-related monies held by the ATO to my Club Super account and to notify me; and
- (c) advise me of any other super found and give me the opportunity to transfer it into my Club Super account.

This consent is ongoing until I revoke it with the Fund in writing or by calling **1300 369 330**. For further information on the collection and use of TFNs please refer to *Additional Information How super is taxed* available at clubsuper.com.au

MY TAX FILE NUMBER IS

DECLARATION AND AUTHORISATION

By signing this form I am making the following statements:

- I declare that I have fully read this form and the information completed is true and correct;
- I am aware I may ask the Trustee of my previous superannuation fund 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 any insurance benefit I had in my previous fund may cease upon transfer and that my previous fund may charge fees to effect this transfer;
- I discharge the Trustee of my previous superannuation fund of all further liability in respect of the benefits paid and transferred to Club Super.

I request and consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect to this transfer.

SIGNATURE

DATE

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ADDITIONAL INFORMATION

Your privacy is important to us

When your personal details are provided to Club Super, they are securely stored and are accessible only to authorised personnel and third parties for the purpose of administering your account. If you would like to see Club Super's Privacy Policy, visit clubsuper.com.au or call us on **1300 369 330** for a copy of the Privacy Policy.

What if you have more than one previous super fund?

If you have more than one fund to rollover into Club Super, please complete a separate form for each fund.

Have you changed your name?

If you have changed your name, you will need to provide a certified copy of: Marriage Certificate, Decree Nisi, Deed Poll or change of name certificate from the Births, Deaths & Marriages Registration Office. Please note that a Ceremonial Certificate is not acceptable.

Club Super will contact your previous fund

Completing this form authorises Club Super to contact your previous fund/s. Club Super will arrange for your money to be rolled over.

Before completing this form, you should contact your other fund to find out if rolling over your super will result in the loss of any benefits, including insurance.

Tax File Number (TFN)

You are not obligated to provide your TFN to your superannuation fund. However, if you do not provide your TFN, your fund may be taxed at the highest marginal tax rate plus the Medicare levy on employer and salary sacrifice contributions made to your account in the year, compared to the concessional tax rate of 15%. Your fund may deduct this additional tax from your account.

If your superannuation fund does not have your TFN, you will not be able to make after-tax personal contributions to your superannuation account. Choosing to quote your TFN will also make it easier to keep track of your superannuation in the future.

Under the Superannuation Industry (Supervision) Act 1993, your superannuation fund is authorised to collect your TFN, which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change. The TFN may be disclosed to another superannuation provider, when your benefits are being transferred, unless you request in writing that your TFN is not to be disclosed to any other trustee.

CHECKLIST

To ensure we can assist you in rolling your other superannuation accounts into Club Super, please complete the checklist below.

- ☐ Have you considered where your future employer contributions will be paid?
- ☐ Have you completed all of the relevant fields on the form ?
- ☐ Have you signed and dated the form?
- ☐ Have you supplied your Tax File Number?

HAVE YOU COMPLETED ALL SECTIONS OF THIS FORM?
PLEASE CALL 1300 369 330 IF YOU HAVE ANY QUESTIONS.

RETURN COMPLETED FORM TO: CLUB SUPER PO BOX 10726 BRISBANE ADELAIDE STREET QLD 4000
OR EMAIL A SCANNED COPY OF THE COMPLETED FORM TO: info@clubsuper.com.au