

Super rollover form

Issued 1 January 2014

Suncorp Portfolio Services Limited (Trustee)
ABN 61 063 427 958, AFSL 237905, RSE L0002059

Suncorp Everyday Super - Super (USI RSA0682AU)
Suncorp Everyday Super - Pension (USI RSA0681AU)

Use this form if you'd like to combine ('rollover') your other super account(s) into your Suncorp Everyday Super account



This form can be used for super accounts, and when you're starting a pension or transition to retirement account with Suncorp Everyday Super.

Tips to help you complete this form

- Use a blue or black pen and write in CAPITAL letters
- Use an 'x' to mark answer boxes
- Complete all sections of the form and sign and date on the last page

If you're rolling over more than one super fund into your Suncorp Everyday Super account, you'll need to fill in a separate form for each fund. You can either photocopy this form, or download one from our website.

Important information

You MUST provide proof of identity before we can process your rollover – see 'Proof of identity' for what you need to do.

Personal Details

Suncorp Everyday Super account number (if known)

Title

Last name

Given name(s)

Date of birth / / Tax file number (if you have it)

Daytime phone number Alternative phone number

Email address

Previous address (If you know that the address held by your previous super fund is different to your current residential address, please give the details below)

Street name and number or PO Box number

Suburb / Town

State Postcode

Details of the super fund you'd like to transfer into your Suncorp Everyday Super account

Your account or member number Approximate account balance \$

Fund name

Fund address

Fund phone number

Unique superannuation identifier (USI)

Fund provider

Employer Details

Employer name

Employer contact number

Termination of employment - Date you left your employer / /

You have lodged a Choice of Fund form with your employer Yes No

Date of your last contribution made / / (if unknown, leave blank and we will contact your employer)

We can help you find lost super and combine it into your new account

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

i TFN is required for us to complete a super search

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

Proof of 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.*

*Any bank should be able to certify your documents, but to find your nearest Suncorp Bank branch, just go to 'Find a branch' at suncorpbank.com.au

Step 2

Ask them to certify your ID.

They'll do this by stamping or writing 'This is to certify that this is a true copy of the original which I have sighted', followed by their signature, full 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 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. Go to suncorp.com.au/super/consolidate-your-super or give us a call on 1800 191 517 and we'll explain your options.

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)
- ✓ Attach a copy of your super statement if you have one
- ✓ Filled out a separate form and separate set of certified documents for each super fund you're rolling over to your Suncorp Everyday Super account
- ✓ Given yourself a pat on the back – you've just taken a big step in simplifying your financial life!

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 'Details of the super fund you'd like to transfer into your Suncorp Everyday Super account' 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 Suncorp Everyday Super account mentioned in 'Personal details' 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 the 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 have read and agree to be bound by the privacy policy found on the Suncorp website suncorp.com.au

Instruction to trustee of the previous fund

Please transfer my entire account balance to the Trustee of the SMT in relation to my Suncorp Everyday Super account noted in 'Personal details' of this form. The 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 the 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 true and correct and I consent to the authorities listed above

Signature Date / /

Full name

Where to send the form(s) and certified ID

Please send the completed form to
Suncorp Everyday Super
GPO Box 1453 - IPC: 4LS004
Brisbane QLD 4001