

Suncorp Employee Superannuation Plan

Super rollover form



Suncorp Portfolio Services Limited (Trustee)
ABN 61 063 427 958 AFSL 237905 RSE L0002059
USI 98350952022042

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

Please use CAPITAL letters and a black or blue pen.

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

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 1800 652 489

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.suncorpsuperrollover.com.au

1. Your details

Suncorp Employee Superannuation Plan account number

(if known)

Title*

Last name*

Given name(s)*

Date of birth*

/ /

Tax file number (if you have it)

Daytime phone number*

Mobile

Email

(*mandatory field)

2. Details of the fund you'd like to transfer into your Suncorp Employee Superannuation Plan account

Your account or member number

Approximate account balance \$

Name of fund*

Address of fund

Fund phone number

Unique superannuation identifier (USI)

Fund provider

(*mandatory field)

3. 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.*

*Any bank should be able to certify your documents, but to find your nearest Suncorp Bank branch, just go to 'Find a branch' at www.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 www.suncorp.com.au/superconsolidation or give us a call on 1800 652 489 and we'll explain your options.

4. 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 Suncorp Employee Superannuation Plan 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 Suncorp WealthSmart 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 Suncorp WealthSmart account
- Before or at the time I provided any personal information, I read and understood the Trustee's privacy statement in the current Suncorp Employee Superannuation Plan Product Guide, which is also 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 Suncorp Employee Superannuation Plan 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 Suncorp Employee Superannuation Plan 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: **Suncorp Employee Superannuation Plan**
Reply Paid 2585 (IPC: LS004)
Brisbane QLD 4001