



Super rollover form

Issued April 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 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'd like help completing this form, or if you have any questions, just call us on 1800 191 517

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 information

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

Personal Details

Suncorp Everyday Super account number (if known)

Title*

Last name*

Given name(s)*

Date of birth* / / Tax File Number*

Daytime phone number* Alternative phone number

Email address

Please include your previous address if you have moved recently.

Street name and number

Suburb/Town

State Postcode

*mandatory field

^If you don't provide your TFN, your super fund(s) may request that you provide a proof of identity.

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

You can find detail to complete this section on a previous fund statement

Fund 1

Fund name*

Your account or member number* Full or Partial \$

Unique superannuation identifier (USI)

*mandatory field

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

If you have more than five funds you would like to transfer please complete a new form.

Fund 2

Fund name*

Your account or member number* Full or Partial \$, ,

Unique superannuation identifier (USI)

Fund 3

Fund name*

Your account or member number* Full or Partial \$, ,

Unique superannuation identifier (USI)

Fund 4

Fund name*

Your account or member number* Full or Partial \$, ,

Unique superannuation identifier (USI)

Fund 5

Fund name*

Your account or member number* Full or Partial \$, ,

Unique superannuation identifier (USI)

*mandatory field

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 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.

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 understand that once the rollover has been completed and funds are transferred to my Suncorp Everyday Super 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 Everyday Super account
- Before or at the time I provided any personal information, I read and understood the Trustee's privacy statement in the current Suncorp Everyday Super 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 nominated amount (full or partial) 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)

Please send the completed form to



Reply Paid
Suncorp Everyday Super
GPO Box 2585
Brisbane QLD 4001

Contact us

1800 191 517
[www everydaysuper@suncorp.com.au](mailto:everydaysuper@suncorp.com.au)
 suncorp.com.au/super