

Superannuation Rollover Information booklet



When to use this form?

You can use this form to transfer money into your Suncorp WealthSmart® account, or request a search for your lost super.

Prefer to do this online?

Our online rollover wizard can make the consolidation process easier. Visit suncorp.com.au/combineyoursuper to get started.

Great reasons why you should combine your super

If you've had a few jobs, you've probably got a few different super accounts. One of the easiest ways to simplify your finances, and potentially boost the amount of money you'll have when you retire, is to combine multiple super accounts into one.

Important things to remember

- Read this Information booklet carefully and follow the instructions on the enclosed form.
- This form can be used for partial or full rollovers amounts for up to 5 super funds.
- This form cannot be used to open a super account, change the super fund in which your employer pays, claim a tax deduction for personal contributions and transfer benefits under certain circumstances.
- Please be advised any KiwiSaver sourced benefits as part of your super rollover cannot be accepted at this time.
- 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.

- Using this form to transfer your super will not change the fund to which your employer pays your contributions and may close the account you are transferring your super from.
- When you transfer your super, your entitlements under that super fund may cease. You need to consider all relevant information before you make a decision to transfer your super.

How to complete this form

Step 1

Complete your personal details including your Tax File Number (TFN).

You are not required by law to provide your TFN but if your other super fund(s) do not have your TFN they may request that you provide a proof of identity, or you may pay more tax on your super than you would otherwise pay.

Step 2

You will need to provide some information on your other super fund (s). You can find detail to complete this section on a previous fund statement.

Step 3

You need to sign the form and read the authority carefully. You can use this form for up to 5 super funds, please complete a new form if you need to.

Step 4

Send the form(s) back to us using the contact information provided at the back of the form.

Please feel free to call us if you have any questions.

2. Details of the funds you'd like to transfer into Suncorp WealthSmart

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)[^]

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

[^]A USI is a form of unique identification for a superannuation fund's products. You may be able to locate the USI on a previous fund statement.

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 the Trustee 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 the Trustee finds any lost super held with the ATO, you authorise the Trustee to transfer the amount to your nominated Suncorp WealthSmart account where possible. We'll let you know the result of our search in 4-6 weeks.

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) (ABN 98 350 952 022, RSE Fund Registration No. R1056655) in relation to my Suncorp WealthSmart 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 WealthSmart 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 WealthSmart 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.

Name

Member's signature

Date / /

Checklist

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

- ✓ Filled in all relevant sections of the form
- ✓ Signed and dated it
- ✓ 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)

Please send the completed form to:

Suncorp WealthSmart®
Reply Paid 2585
Brisbane QLD 4001