

Suncorp Super Rollover form

When to use this form?

Use this form to request a transfer of other super monies into your Suncorp super account.

Prefer to do this online?

Visit suncorp.com.au/super/combine-your-super 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.

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
- Sign and date the form
- Fields marked with * are mandatory

Have any questions?

If you'd like help completing this form, or if you have any questions, just call us between 9am and 5pm (AEST) Monday to Friday on 13 11 55 for Suncorp Brighter Super, 1800 191 517 for Suncorp Everyday Super or 1800 652 489 for the Suncorp Employee Superannuation Plan

Important things to remember

- When you transfer your super, your entitlements with your other super fund may cease. You need to consider all relevant information before you make a decision to transfer your super.
- This form cannot be used to open a super account.
- You cannot rollover any KiwiSaver sourced benefits into Suncorp super.
- If any of your other super fund(s) have different personal details for you, it is important that you update your details with that fund before requesting the transfer of your benefits, otherwise there will be delays.
- If you want to claim a tax deduction for contributions you have made to your other super fund(s), you will need to let that fund know before you ask us to transfer the benefits to your Suncorp super account.
- Using this form to transfer your super will not change where your employer pays contributions for you. You can use our *Choice* form to ask your employer to contribute your super guarantee contributions to your Suncorp super account.
- Before deciding whether to consolidate your super, you should speak to a financial adviser who can consider your personal circumstances, and contact your other super fund(s) to find out whether any fees would be payable, where future employer contributions will be paid, how your current insurance arrangements will be impacted and any other possible impact(s) e.g. to your investments or tax position.

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 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 details to complete this section on a statement you have received from your other fund(s). You can use this form to transfer up to 4 super funds and a Self-Managed Super Fund. Please complete a second form if you have more funds to transfer.

Step 3

Read the authority carefully and sign the form.

Step 4

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

Personal Details

Account number*	<input type="text"/>
Date of birth*	<input type="text" value="DD / MM / YYYY"/>
Title*	<input type="text"/>
Given name(s)*	<input type="text"/>
Last name*	<input type="text"/>

*mandatory field

Contact Details

Update your contact details if they have changed or we don't have them on file. Please provide your phone number so we can contact you if we have a question about your form.

Residential address (sorry - we can't accept PO Boxes)	<input type="text"/>	<input type="text" value="State"/>	<input type="text" value="Postcode"/>
Country (if not Australia)	<input type="text"/>		
Daytime phone number	<input type="text"/>	Mobile phone number	<input type="text"/>
Email address	<input type="text"/>		
Postal address (if different from above)	<input type="text"/>		
	<input type="text" value="State"/>	<input type="text" value="Postcode"/>	
Country (if not Australia)	<input type="text"/>		

Tax file number notification (if not previously provided)

Tax File Number (TFN) - -

Important information: We are required to provide you with the following information when requesting your tax file number.

It's important we have your TFN. It's up to you whether you give it to us, and it's not an offence if you don't, but we can't accept any after-tax contributions from you, it might be difficult to find super funds you may have forgotten about, to combine your super in one account, and you may pay more tax on concessional contributions (from pre-tax money - e.g. salary sacrifice) than you would otherwise. We're legally authorised to collect, use and disclose your TFN under the Superannuation Industry (Supervision) Act. And of course, we'll keep it confidential and only use it for lawful purposes, including finding or identifying your super funds, calculating tax on any superannuation lump sums, providing your TFN and other information to the Australian Taxation Office (ATO), and providing your TFN to your future super fund trustee or retirement savings account provider if you're transferring your account. These lawful purposes may change in the future, as a result of legislative changes. We won't pass on your TFN to another super fund if you write and tell us not to.

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

You can find these details on a statement sent to you by your other super fund(s). If you have more than four funds to transfer, please complete a second form. If you are transferring from a Self-Managed Super Fund please complete your fund's details in the Self-Managed Super Fund section below Fund 4.

Fund 1

Fund name*	<input type="text"/>		
Your account or member number*	<input type="text"/>	Transfer amount*	<input type="checkbox"/> Total <input type="checkbox"/> Partial <input type="text" value="\$"/>
Unique superannuation identifier (USI)*	<input type="text"/>		

Fund 2

Fund name*	<input type="text"/>		
Your account or member number*	<input type="text"/>	Transfer amount*	<input type="checkbox"/> Total <input type="checkbox"/> Partial <input type="text" value="\$"/>
Unique superannuation identifier (USI)*	<input type="text"/>		

Fund 3

Fund name*	<input type="text"/>		
Your account or member number*	<input type="text"/>	Transfer amount*	<input type="checkbox"/> Total <input type="checkbox"/> Partial <input type="text" value="\$"/>
Unique superannuation identifier (USI)*	<input type="text"/>		

Fund 4

Fund name*	<input type="text"/>		
Your account or member number*	<input type="text"/>	Transfer amount*	<input type="checkbox"/> Total <input type="checkbox"/> Partial <input type="text" value="\$"/>
Unique superannuation identifier (USI)*	<input type="text"/>		

Self-Managed Super Fund

SMSF name*	<input type="text"/>		
SMSF ABN*	<input type="text"/>	Transfer amount* <input type="checkbox"/> Total <input type="checkbox"/> Partial	<input type="text" value="\$"/>
SMSF electronic service address*	<input type="text"/>		

*mandatory field

You can find a fund's unique superannuation identifier (USI) on a statement you have received from the fund or on the fund's website.

Your SMSF must have an electronic service address (ESA) to receive SuperStream data and for this rollover request to be processed. You can get an ESA from an SMSF messaging provider or through your SMSF intermediary/administrator.

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. You can track down your super through your Suncorp super online account or we can walk you through the process. You'll need to have your TFN and proof of identity documents on hand.

Please contact me to help me track down my lost super or other super accounts.

Declaration and signature

- I request the trustee(s) and administrator(s) of the other super fund(s) named above to transfer the benefit(s) nominated to my Suncorp super account.
- Although I understand that I can request from my other super fund(s) any information I require in order to understand my benefit entitlement(s), I don't require any further information.
- The Suncorp super trustee and administrator are authorised to act on my behalf in relation to this transfer request(s) and I authorise the release of information relating to the benefits I have nominated for transfer to them in order to facilitate and finalise the transfer request(s). I authorise a copy (including an electronic copy) of this form to be provided to the trustee and/or administrator of the other super fund(s) nominated as evidence of this authority.
- I authorise the transfer to my Suncorp super account of any contributions received by the other super fund(s) nominated after my benefits have been transferred.
- I understand that the trustee may be required by law to deduct tax from any untaxed element in the amount(s) transferred.
- I understand that the trustee(s) of my other super fund(s) is discharged from any further liability in respect of any amount(s) once transferred.
- I understand KiwiSaver components cannot be transferred to Suncorp super and authorise my transfer amount instruction(s) to be reduced accordingly to exclude these amounts.
- I've read and understood the trustee's privacy policy) and consent to the collection, use and disclosure of my information in accordance with that statement.

Your signature*

Date*

*mandatory field

Where to send your form

Mail: Suncorp Super, GPO Box 2585, Brisbane QLD 4001

Email: super@spsl.com.au

If your employer is currently contributing to a super account you are consolidating with us, and you would like them to contribute to your Suncorp super account, you should complete a *Choice* form available at suncorp.com.au/super/resources/documents and give it to your payroll office.