

Completing the rollover request for whole balance transfers to AUSfund

By completing this form, you will initiate a rollover request to transfer the whole balance of your super benefits to AUSfund.

This form cannot be used to transfer part of the balance of your super benefits.

Before completing this form read the important information below.

When completing this form

- Refer back to these instructions where a question shows this symbol ⓘ
- Print clearly in BLOCK LETTERS

After completing this form

- Sign the authorisation
- Review the checklist below
- Send the request form to AUSfund

Privacy

Personal information you provide us in respect of this request is subject to the terms of the Privacy Policy applying to AUSfund which is available on the AUSfund website at unclaimedsuper.com.au

Important Information

⚠ This transfer may close your current super account in your FROM fund. You will need to check this with your FROM fund (i.e. the fund FROM which you are transferring).

This form cannot be used to:

- transfer part of the balance of your super benefits
- transfer benefits if you don't know where your super is
- transfer benefits from multiple funds on this one form – a separate form must be completed for each fund you wish to transfer super from
- change the fund to which your employer pays contributions on your behalf
- transfer benefits under certain conditions or circumstances – for example, if there is a super agreement under the Family Law Act 1975 in place

Checklist

- Have you read the important information?
- Have you considered where any future employer contributions will be paid?
- Have you completed all of the mandatory fields on the form?
- Have you signed and dated the form?

What happens to my future employer contributions?

Using this form to transfer your benefits will not change the fund to which your employer pays your contributions and may close the account you are transferring your benefits FROM. If you wish to change the fund into which your employer contributions are being paid, you will need to speak to your employer about super choice. **Please note that AUSfund cannot receive employer contributions.** To check if you are eligible to choose the fund to which your employer contributions are made, visit ato.gov.au or call the Australian Taxation Office (ATO) on 13 10 20.

Things you need to consider when transferring your super

When you transfer your super, your entitlements under the fund you are transferring FROM may cease. You need to consider all relevant information before you make a decision to transfer your super. If you ask for information, your super fund provider must give it to you. Some of the points you may consider are:

- Fees** – your FROM fund must give you information about any exit or withdrawal fees. If you are not aware of the fees that may apply, you should contact that fund for further information before completing this form. The fees could include administration fees, and exit or withdrawal fees. Differences in fees that funds charge can have a significant effect on the super you will have to retire on – for example, a 1% difference in fees may significantly reduce your final benefit.
- Insurance** – your FROM fund may insure you against death, illness or an accident which leaves you unable to return to work. If you choose to leave your current fund, you may lose any insurance entitlements you have. **AUSfund does not offer insurance.**
- Contributions** – AUSfund cannot accept member or employer contributions, but does accept transfers from other super funds.
- Investment choice** – AUSfund does not offer investment choice.

What happens if I do not quote my Tax File Number (TFN)?

You are not required to provide your TFN to your super fund. However, choosing to quote your TFN will make it easier to keep track of your super in the future.

Under the Superannuation Industry (Supervision) Act 1993, your super fund is authorised to collect your TFN, which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change. The TFN may be disclosed to another super provider when your benefits are being transferred, unless you request in writing that your TFN is not to be disclosed to any other fund.

Although providing your TFN isn't compulsory, it may slow down the processing of your transfer if you don't provide it. Your transfer FROM fund may require you to provide additional identification.

Have you changed your name or are you signing on behalf of another person?

If you have changed your name or are signing on behalf of the applicant, you will need to provide a certified copy of a linking document. A linking document is a document that proves a relationship exists between two (or more) names.

The following table contains information about suitable linking documents.

Purpose	Suitable linking documents
Change of name	Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office
Signed on behalf of the applicant	Guardianship papers or Power of Attorney

*For details about certifying a document go to unclaimedsuper.com.au

Rollover request for whole balance transfers to AUSfund

Under the Superannuation Industry (Supervision) Act 1993

Completing this form:

Read the important information pages

Refer to additional instructions over page where this symbol is shown ⓘ

This form is only for whole (not part) balance transfers

If you have any questions about the completion of this form, call **1300 361 798** or email **admin@ausfund.net.au**

***Denotes mandatory field. If you don't complete mandatory fields, there may be delays in processing your request.**

After completing this form:

Sign the authorisation

Send form to: **AUSfund, PO Box 2468, Kent Town, SA 5071**

Step 1: Personal details

Title: Gender: Date of birth: / /

* Family name: * Given names:

Previous/other names:

Tax File Number: Under the Superannuation Industry (Supervision) Act 1993, you are not obliged to disclose your tax file number, but there may be tax consequences. ⓘ See 'What happens if I do not quote my tax file number?'

* Current address:

* Suburb/Town: * State/Territory: * Postcode:

ⓘ If you know that the address held by your FROM fund is different from your current residential address, give details below.

Previous address:

Suburb/Town: State: Postcode:

* Contact phone: * Email:

Step 2: Fund Details

FROM (Transferring Fund)	TO (Receiving Fund)
* Fund name: <input type="text"/>	Fund name: AUSfund
Fund phone: <input type="text"/>	Fund phone: 1300 361 798
* Membership/Account number: <input type="text"/>	ABN: 85 945 681 973
ABN: <input type="text"/>	Unique Superannuation Identifier: APF0100AU
Unique Superannuation Identifier: <input type="text"/>	ⓘ If you have multiple account numbers with your fund, you must complete a separate form for each account you wish to transfer to AUSfund

Step 3: Authorisation

By signing this request form I am making the following statements:

- I declare I have fully read this form and the information completed is true and correct.
- I am aware I may ask my superannuation provider for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits, and have obtained or do not require such information.
- I consent to my tax file number being disclosed for the purposes of consolidating my account.
- I discharge the superannuation provider of my FROM fund of all further liability in respect of the benefits paid and transferred to AUSfund.
- I request and consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect to this transfer.

* Name (Print in BLOCK LETTERS)

* Signature:

* Date:

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