

# TRANSFER YOUR SUPER FORM



Complete this form to transfer the whole or part of the balance of your other Australian super accounts into Energy Super. Do not use this form to request a transfer of super or pension monies from another country. If you would like to transfer your super/pension monies from another country into Energy Super, please contact us.

Before completing this form should read the important information on page 3.

You must complete a separate *Transfer Your Super Form* for each fund transfer you make into Energy Super.

If you are transferring the whole balance of your super from another super fund where you have Death & Total and Permanent Disablement (TPD) cover, you may be able to replicate these arrangements in Energy Super if you wish. Please read the *Energy Super Insurance Guide* or *Corporate Insurance Guide* (as applicable), complete an *Insurance Transfer Form* and attach that form to this one.

Please complete this form in BLOCK letters using blue or black pen. Print an 'X' to mark boxes where applicable.

YOUR PERSONAL DETAILS	
Energy Super member number (if known):	<input type="text"/>
Surname:	<input type="text"/>
Title: Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Dr <input type="checkbox"/>	
Given names:	<input type="text"/>
Date of birth: (DD/MM/YYYY) <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
Residential address:	<input type="text"/> <input type="text"/>
State: <input type="text"/> Postcode: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
Postal address (if same as above, write "as above"):	<input type="text"/> <input type="text"/>
State: <input type="text"/> Postcode: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
Telephone (home):	<input type="text"/>
Telephone (work):	<input type="text"/>
Mobile:	<input type="text"/>
Primary email:	<input type="text"/>
Secondary email:	<input type="text"/>
Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female	

YOUR TAX FILE NUMBER (TFN)
I agree to provide my TFN for the purpose outlined in the <i>How My Super is Taxed</i> Guide: Yes <input type="checkbox"/> No <input type="checkbox"/>
I consent to allow Energy Super to: (a) use my TFN to search the Australian Taxation Office's (ATO) SuperMatch service for any super I may have; (b) transfer any super-related monies held by the ATO to my Energy Super account and to notify me; and (c) advise me of any other super found and give me the opportunity to transfer it into my Energy Super account. This consent is ongoing until I revoke it with the Fund in writing or by calling <b>1300 4 ENERGY</b> (1300 436 374). For further information on the collection and use of TFNs please refer to the <i>How my super is taxed</i> Guide available at <b>energysuper.com.au</b> Yes <input type="checkbox"/> No <input type="checkbox"/>
I advise that my TFN is: <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/>
I have read the information concerning Tax File Numbers and understand a failure to provide my TFN will result in tax implications on my concessional contributions and the inability of the Fund to receive any non-concessional contributions. I further understand the Fund will only use my TFN for the approved purposes.

## DETAILS OF OTHER FUND

Name of the fund:

ABN of the fund (if known):

Unique Superannuation Identifier (USI) of the fund (if known):

Your member number in the fund:

Your approximate balance:

Fund's postal address:

State:  Postcode:

If you have changed your name and have not advised your other fund, please complete the section below and provide a linking document (i.e. a certified copy of your official name change certificate) for your other fund to verify your identity.

Previous given names:

Previous surname:

If the address held by your other fund is different to your current address, please complete the section below:

Previous address:

State:  Postcode:

If you have multiple account numbers with this fund, you must complete a separate form for each account you wish to transfer.

To help your other fund transfer your money into Energy Super more quickly, if possible, attach a copy of your other fund's annual statement(s).

## TRANSFER INSTRUCTIONS

**Print an "X" in one of the options below.**

I wish to transfer the following to Energy Super:

The balance of my account held by the other fund (nominated above)

OR

An amount of \$

which is part of my account balance held by the other fund (nominated above)

## HOW YOUR TRANSFER WILL BE INVESTED

Your transferred amount will be invested in the investment option(s) previously chosen by you. If you have not made a previous investment choice, it will be invested in the default option relevant to you.

If you would like to change your investment choice, please complete a *Change of Investment Choice* Form and attach that form to this one. Alternatively, you can change your investment choice by logging onto Member Online.

## AUTHORISATION AND DECLARATION

I declare I have fully read this form and the information completed is true and correct. I am aware I may ask my other fund (nominated opposite) 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 authorise Energy Super and my other fund to exchange any information relevant to this transfer. I authorise Energy Super to have my benefits transferred into my Energy Super account and acknowledge that this notice is irrevocable. I understand that in authorising the transfer, I discharge my previous fund's Trustee of any further liability in respect of any amount once the benefit has been transferred to Energy Super. I authorise the deduction of transfer fees (if any) from the benefits transferred into Energy Super, subject to any legislative restrictions. If I am transferring the whole balance of my account to Energy Super, after my super benefits have been transferred to my Energy Super account, I authorise the Trustee of my previous super fund to transfer any contributions, subsequently made to my old account, to Energy Super.

I understand that my transfer will be deposited in the investment option(s) previously chosen by me. If I have not made a previous choice, I understand that the money will be invested in the default option.

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.

Applicant's signature:

Date (DD/MM/YYYY):  /  /

## YOUR PRIVACY IS IMPORTANT TO US

We are collecting your personal information. Please read our Privacy Statement in the *Energy Super Member Guide Product Disclosure Statement (PDS)*, *Corporate Member Guide PDS*, *Income Stream PDS* or *Market Linked Pension PDS* (as applicable) for information about how we will handle this information, our likely overseas disclosures (where applicable) and how you can access or correct your personal information or make a privacy complaint.

## IMPORTANT INFORMATION

### 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 contributions are being paid, you will need to speak to your employer about Choice of Fund. For the appropriate forms and information about whether you are eligible to choose the fund to which your employer contributions are made, visit [ato.gov.au](http://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 that fund 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 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 your fund for further information before completing this form. The fees could include administration fees as well as exit or withdrawal fees. Differences in fees that funds charge can have a significant effect on what you will have to retire on. For example, a 1% increase in fees may significantly reduce your final benefit.

**Death and disability benefits** – 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. When considering a new fund, you may wish to check the costs, terms and amount of any cover offered.

### WHAT HAPPENS IF I DO NOT QUOTE MY TAX FILE NUMBER (TFN)?

You are not obligated to provide your TFN to your super fund. However, if you do not provide your TFN, your fund may be taxed at the highest marginal tax rate plus the Medicare levy on contributions made to your account in the year, compared to the concessional tax rate of 15%. Your fund may deduct this additional tax from your account.

If your super fund does not have your TFN, you will not be able to make personal contributions to your super account. Choosing to quote your TFN will also 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 trustee.

## HAS YOUR NAME CHANGED OR ARE YOU SIGNING ON BEHALF OF ANOTHER PERSON?

To prove the link between you and the other person, or that your name has changed, you will need to provide a certified copy of a **linking document**. Some examples of linking documents can be seen below.

If you have changed your name you'll need a certified copy of one of these:

- Marriage certificate (from the Births, Deaths and Marriages Registration Office),
- Deed poll, or
- Change of name certificate (from the Births, Deaths and Marriages Registration Office).

If you are signing on behalf of another person you'll need a certified copy of one of these:

- Guardianship papers
- Power of Attorney.

### WHO CAN CERTIFY YOUR LINKING DOCUMENTS

- Justice of the Peace (JP) or Commissioner for Declarations
- a police officer
- a notary public
- a financial services company officer (e.g. bank or super fund employee) with two or more years of continuous service with one or more of those employers
- a permanent employee of the Australian Postal Corporation with two or more years of continuous service who is employed in an office supplying postal services to the public
- a person enrolled on the roll of State or Territory Supreme Court or the High Court of Australia, as a legal practitioner
- a member of the Institute of Chartered Accountants in Australia, CPA Australia or the National Institute of Accountants with five or more years of continuous membership.

For a more extensive list of individuals approved to certify your linking documents, please see the *Proof of Identity Requirements* Fact Sheet, available at [energysuper.com.au](http://energysuper.com.au)

### IMPORTANT

All copied pages of ORIGINAL linking documents need to be certified as true copies by an individual approved to do so (see the list above).

To certify your documents they need to:

1. Compare the photocopy to the ORIGINAL document
2. Stamp or write 'This is a true and correct copy of the original' followed by their signature, printed name and qualification (e.g. Justice of the Peace, Police officer) and the date.

## CAN I FAX OR EMAIL MY DOCUMENTS TO ENERGY SUPER?

Yes, we are able to accept proof of identification documents by email or fax as long as they are clear to read and certified by a JP. You can still post these documents if you wish to do so to the following address:

**Energy Super**  
**PO Box 10530**  
**Brisbane Adelaide Street QLD 4000**

## CHECKLIST

To avoid any delays in processing your rollover transfer to Energy Super, please ensure that you provide the information and documents as requested in this form. All financial institutions are required by law to maintain rigid identity checking procedures to prevent fraud and money laundering.

- Have you signed and dated this form?
- Have you attached your certified linking documents (linking documents are only required if you have a name change or if you are signing on behalf of another person)?
- Have you provided your Tax File Number (TFN) to Energy Super?
- Have you completed all of the relevant sections in this form?

## RETURN THIS FORM

**Energy Super**  
PO Box 10530  
Brisbane Adelaide Street QLD 4000

**F 07 3229 7523**  
*(remember to send all pages of the form)*

**E info@energysuper.com.au**  
*(as a scanned email attachment)*

## TALK TO US

**T 1300 4 ENERGY (1300 436 374)**

**E info@energysuper.com.au**

**W energysuper.com.au**

**Energy Super**  
Level 8, 100 Creek Street  
Brisbane QLD 4000  
PO Box 10530  
Brisbane Adelaide Street QLD 4000

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