Combine my super (rollover) form

UniSuper

Complete this form to arrange the rollover of your super from a previous fund to your UniSuper account.

Important information

One form is required for each rollover into UniSuper from a previous fund. You can photocopy this form or download another form from **www.unisuper.com.au**.

You must provide separate certified proof of identity documents for each rollover request you make.

You should check whether your previous fund will charge you any exit or withdrawal fees. You should also check whether any benefits such as insurance cover might cease once you have combined your super.

Further information

If you need further information or help to complete this form:

- contact your employer's **Superannuation Officer**
- call the UniSuper Helpline on **1800 331 685**, or
- visit our website at **www.unisuper.com.au**

Privacy information

UniSuper recognises the importance of protecting your personal information and is committed to complying with its privacy law obligations. UniSuper collects and manages various types of personal information about you to provide you with UniSuper membership and benefits. To find out more about how UniSuper collects and manages your personal information, please refer to UniSuper's Privacy Policy, which is available from UniSuper's website at **www.unisuper.com.au** or by calling the UniSuper Helpline on **1800 331 685** between 8.30 am and 5.30 pm (AEST) Monday to Friday.

Following up on your rollover request

UniSuper will send your rollover request to your previous fund on your behalf.

Please note that delays may be experienced with your rollover request as a result of your previous fund's administration process. Some funds may require additional documentation to be provided before your rollover can be processed. You should follow up with your previous fund to ensure your request is processed promptly.

To check if your rollover request has been successfully completed, log onto MemberOnline, the secure member-only section of our website or call the UniSuper Helpline on **1800 331 685**.

SECTION 1 — Member details

Please use BLACK or BLUE BALLPOINT PEN and print in CAPITAL LETTERS. Cross where required X

UniSuper member number

If you are unsure of your member number, refer to your most recent UniSuper correspondence or call the UniSuper Helpline on 1800 331 685.

Title: Mr ☐ Mrs ☐ Ms ☐ Dr ☐ Professor ☐

Other

Surname

Given name

Date of birth *(DDMMYYYY)*

D D M M Y Y Y Y

Residential address, number and street *(not PO Box)*

Suburb/Town

State Postcode

Country *(if not Australia)*

Postal address, number and street *(or PO Box if applicable)*

Suburb/Town

State Postcode

Country *(if not Australia)*

What is the phone number you wish UniSuper to call you on if there is a question we need to ask you regarding this form?

Contact number *(during business hours)*

( )

form continues →

SECTION 2 — Previous fund details

Refer to your last Benefit Statement from your previous fund to help you complete these details.

Your membership/policy number of previous fund *(if known)*

Full name of previous fund

Australian Business Number (ABN) of previous fund

Superannuation Product Identification Number (SPIN) *(if known)*

Address of previous fund *(number and street, or PO Box)*

Suburb/Town

State Postcode

SECTION 3 — Proof of identity

See overleaf for more information on certifying proof of identity documents.

Note: your name must be the same as shown on your proof of identity. If your name has changed you must include proof of the change (e.g. a certified copy of a marriage certificate).

☐ I have attached a certified copy of my current driver's licence or learner's permit (or foreign driver's licence if it contains your photograph and signature), or Australian or foreign passport (current or expired for less than 2 years)

OR

☐ I have attached certified copies of:

- either my Birth/Citizenship Certificate, Centrelink or Department of Human Services (DHS) Pension Card, Health Care Card, Commonwealth Seniors Health Card or Pensioner Concession Card;

  AND

- either my tax assessment notice from the Australian Taxation Office (less than 12 months old), Government benefits notice (less than 12 months old), local government rates notice or utility bill i.e. electricity or gas (less than 3 months old).

SECTION 4 — Member declaration and signature

Please read this before you sign and date your form.

- I declare that the information I have provided on this form is true and correct.
- I consent to the rollover of superannuation as described on this form and authorise the superannuation provider to give effect to my rollover request.
- I authorise UniSuper (or its agents) to contact my other super fund regarding this request to rollover my super from that fund into my UniSuper account.
- I am aware that I may ask the trustee of my previous fund for all the information that I need to understand my benefit entitlements in that fund and the effect of a rollover on my benefit entitlements and understand and acknowledge the implications of rolling over my benefit from my previous fund into UniSuper.
- I discharge the trustee of my previous fund from all further liability in respect of the benefit rolled over to UniSuper.
- I acknowledge and understand that rollovers retain their preservation status and that preserved benefits must generally remain in the superannuation system until I reach my preservation age and permanently retire from the workforce.
- I authorise UniSuper to invest my rollover in accordance with my investment instructions.
- I understand that if I do not have a future contributions strategy or rollover strategy, my rollover will be invested in the Fund's default investment option.

Signature

✗

Date *(DDMMYYYY)*

D D M M Y Y Y Y

Return your completed and signed form, and certified copies of your proof of identity documents to:

UniSuper
Level 35, 385 Bourke Street
Melbourne VIC 3000

Previous fund use only:

- Make cheques payable to UniSuper Limited and send to: UniSuper, Level 35, 385 Bourke Street, Melbourne VIC 3000
- UniSuper:
  ABN 91 385 943 850
  SFN 1302/509/40
  SPIN UNI0001AU

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How do I obtain a certified copy of a document?

To obtain a certified copy of a document, you will need to take your original documents and a clear photocopy of both sides of the original document to a person who is authorised to certify proof of identity documents.

The authorised person will need to:

1. Sight the original document and the copy to ensure that both documents are identical
2. Write or stamp 'this is a true and correct copy of the original document I have sighted' or 'certified true copy', and
3. Write on each copied page their:
   - name
   - signature
   - qualification (i.e. Justice of the Peace), and
   - date.

- All pages of your proof of identity documents must be certified.
- The certification must on the copy of the document not on a separate page attached to the document.
- The certified copies of your proof of identity documents must contain an original signature, faxed or emailed copies will not be accepted.
- If any documents are written in a language other than English, they must be accompanied by an English translation prepared by an accredited translator.

Who can certify my identification documents?

Only certain people are authorised to certify personal documents. Some of those people are listed below:

- a teacher employed on a full-time basis at a school or tertiary education institution
- a Justice of the Peace
- a police officer
- a permanent employee of Australia Post Office (who has worked for at least two continuous years)
- a barrister or solicitor (who is enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia, as a legal practitioner)
- a finance company officer, (e.g. a bank manager or bank employee who has worked for the company for at least two continuous years)
- an officer with, or Authorised Representative of, an Australian Financial Services Licensee (who has had at least two years continuous service with one or more licensees)
- a notary public officer
- a registrar or deputy registrar of a court
- an Australian consular officer or Australian diplomatic officer
- a judge or magistrate of a court
- a Chief Executive Officer of a Commonwealth Court
- an accountant (who is a member of the Institute of Chartered Accountants or CPA Australia or the National Institute of Accountants, with at least two years of continuous membership)

A full list is available from the UniSuper website.

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