

Transfer your Flexi Pension to a super account application form



Use this form to transfer all or part of your Flexi Pension account to a super account with UniSuper.

If you have a Beneficiary Income Stream Flexi Pension you can't transfer your account back to super.

UNDERSTANDING THE RISKS

By completing and returning this form, you'll be requesting a full or partial transfer from your Flexi Pension.

As there may be Centrelink and/or tax implications to transferring your Flexi Pension, we recommend you consult a qualified financial adviser or tax adviser before proceeding. You can get over-the-phone advice or meet with an adviser in person for a more comprehensive discussion about your finances. For more information, call UniSuper Advice on **1800 823 842**.

Please also refer to the *Flexi Pension Product Disclosure Statement (PDS)* available at unisuper.com.au/pds.

PRIVACY STATEMENT

UniSuper is committed to protecting your personal information in accordance with privacy law obligations. The information that you provide to UniSuper on this form is collected and used in accordance with our Privacy Policy which can be found online at unisuper.com.au/privacy. If you have any privacy related questions, please call **1800 331 685**.

THINGS TO CONSIDER

- If you don't have an existing super account with us, we'll open a new Accumulation 1 account for you. You won't receive any default insurance cover and your transferred balance will be invested in our default investment option (Balanced). You can find the *Accumulation 1 Product Disclosure Statement (PDS)* and *Target Market Determination* document at unisuper.com.au/pds.
- If you transfer your full Flexi Pension balance, your account will be closed.
- Flexi Pension accounts require a minimum balance of \$10,000 to remain open. If a partial transfer takes your Flexi Pension below \$10,000, we'll transfer the entire balance to your super account.
- If you took your Flexi Pension under transition to retirement (TTR) rules, you can generally only use this form to transfer your **full** Flexi Pension to a super account.

SECTION 1 YOUR DETAILS

▶ Please complete in BLACK or BLUE BALL POINT PEN and print in CAPITAL LETTERS. Cross (X) where required. All fields in Section 1 are mandatory. Please ensure you complete all fields.

UniSuper pension number (if known)

Do you have an existing super account with us?

No. We'll open a new Accumulation 1 account for you.

Yes. Provide your super account number here.

Super account member number (if applicable)

If you don't know your Flexi Pension and/or super account number, refer to your most recent UniSuper correspondence, check your account online at unisuper.com.au or call us on **1800 331 685**.

Title

Mr Mrs Ms Dr Professor Other

Surname

Given name

Date of birth (DD/MM/YYYY)

Daytime contact number

Email address



SECTION 2 TRANSFER AMOUNT

Would you like to make a **full** or **partial** transfer to a super account? Note: if you took your Flexi Pension under TTR rules, you can generally only select 'Full' here.

Full

Partial. Please provide the amount you'd like to transfer here (minimum \$2,000). Remember your Flexi Pension requires a minimum balance of \$10,000 to remain open.

\$

This amount needs to be gross (before tax is deducted). Amounts requested below the minimum will be processed as \$2,000.

If you're completing a full transfer, please note we may be required to pay you the remainder of your minimum annual pension amount (pro-rata) to comply with superannuation law. See the PDS for more information.

SECTION 3 INVESTING YOUR TRANSFERRED PENSION BALANCE

- **If you have an existing super account**, your transferred pension balance will be invested in line with your rollover strategy. If you don't have a rollover strategy, it will be invested in UniSuper's default investment option (Balanced). To check or update your rollover strategy, log in to your account at unisuper.com.au or you can update your rollover strategy by completing Section 3A.
- **If you don't have an existing super account**, we'll open a new Accumulation 1 account for you and invest your transferred pension balance in UniSuper's default investment option (Balanced). You can change this investment strategy if you want to—simply complete Section 3A.

If you've got any questions or concerns about your investment strategy, consider seeing a qualified financial adviser.

SECTION 3A ROLLOVER STRATEGY

- You can choose a single investment option or a mix of investment options based on your individual requirements. All rollovers to your account—including transfers from an accumulation account to a Flexi Pension and vice versa—will be invested in your chosen option(s). The total must equal 100% and each nomination must be in whole numbers.

If you don't choose an investment option, your account will automatically be invested in the Balanced option, which is the Fund's default option.

Before making a decision about your investment options, refer to the relevant PDS and the *How we invest your money* booklet.

Sector investment options are generally single asset class options that are less diversified and not intended to be used in isolation, but combined with other investment options to build a diversified portfolio. For example, the Australian Equity Income option might have exposure to as few as 20 entities, and the Global Companies in Asia option as few as 40 entities. In comparison, the Balanced option has an exposure to over 1,500 entities.

If you choose to only invest in a Sector option, you may be exposed to more risk and may miss out on the benefits of the balance between risk and return offered by a Pre-Mixed option.

SECTION 3A CONTINUED

Pre-Mixed	Conservative		%
	Conservative Balanced		%
	Balanced (MySuper)		%
	Sustainable Balanced		%
	Growth		%
	High Growth		%
	Sustainable High Growth		%
Sector	Cash		%
	Australian Bond		%
	Diversified Credit Income		%
	Listed Property		%
	Australian Shares		%
	International Shares		%
	Global Environmental Opportunities		%
	Australian Equity Income		%
	Global Companies in Asia		%
	Total	100	%

SECTION 4 YOUR DECLARATION AND SIGNATURE

➤ Please read this declaration before you sign and date your form.

I declare:

- The information provided on this form is true and correct.
- I request and consent to the transfer of my Flexi Pension as indicated on this form and authorise UniSuper to give effect to the transfer.
- I consent to my personal information being used in accordance with UniSuper’s Privacy Policy.
- I acknowledge that this transfer will be treated as a full or partial commutation and have considered any Centrelink and/or tax implications by consulting a qualified financial adviser or tax adviser.
- I acknowledge that I will not be provided with default insurance cover as a result of this transfer.
- I acknowledge that if, after my withdrawal, there is less than \$10,000 in my account, UniSuper will pay the remaining Flexi Pension balance to my super account.

Signature

Date

DD MM YYYY

Returning your form

Email: pensionsmailbox@unisuper.com.au
 Mail: UniSuper
 Level 1, 385 Bourke Street
 Melbourne Vic 3000

Need help?

- Email pensionsmailbox@unisuper.com.au
- Call **1800 331 685**.