

Transfer your Flexi Pension to a super account application form



Use this form to

- Close your Flexi Pension account and transfer the balance to a super account with UniSuper, or
- Transfer part of your Flexi Pension account balance to a super account (generally not applicable to Flexi Pensions taken under Transition to Retirement (TTR) rules). Please note that Flexi Pension accounts require a minimum closing balance of \$10,000 to remain open. If a partial transfer takes your Flexi Pension below \$10,000, we'll transfer the entire balance of your Flexi Pension account to your super account. For more information, see below and refer to the *Flexi Pension Product Disclosure Statement (PDS)* available at unisuper.com.au/pds.

Who can use this form?

All Flexi Pension members can use this form, although some restrictions may apply. Refer to the *Flexi Pension PDS* for more information.

If you took your Flexi Pension under TTR rules, you can generally only use this form to transfer your **full** Flexi Pension to a super account. Refer to the above PDS for more information.

Understanding the risks

By completing and returning this form, you'll be requesting a full or partial commutation 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.

Privacy information

We recognise the importance of protecting your personal information and are committed to complying with our privacy law obligations. For more information on how we collect and manage your information refer to the *Privacy statement* at the end of this form.

SECTION 1 — Your details

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

All fields in Section 1 are mandatory. Please ensure you complete all fields.

Member number

Account number

If you're unsure of your member or account number, refer to your most recent UniSuper correspondence, check your account online at unisuper.com.au or call us on **1800 331 685**.

Do you have an existing super account with us?

Yes.

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

Title Mr Mrs Ms Dr Professor

Other

Surname

Given name

Date of birth (DDMMYYYY)

Daytime contact number

Email address

form continues



NEW SUPER ACCOUNTS

If, in processing your transfer, we create a new super account for you, you won't receive any default insurance cover and your transferred balance will be invested in our default investment option (Balanced).

Learn more about Accumulation 1 in the PDS and understand who the product has been designed for in the Target Market Determination (TMD). Both documents are available at unisuper.com.au/important information.



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 closing balance of \$10,000 to remain open.

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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 establish a new one 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.



DID YOU KNOW

You have exclusive access to expert financial advice from UniSuper for help with managing your retirement savings.

You can get over-the-phone advice on issues related directly to your UniSuper account, or meet with an adviser in person for a more comprehensive discussion about your finances.

Call UniSuper Advice on **1800 823 842** to find out more.

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 MySuper option.


Before making a decision about your investment options, refer to the 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.

PRE-MIXED	Conservative	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
	Conservative Balanced	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
	Balanced (MySuper)	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
	Sustainable Balanced	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
	Growth	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
	High Growth	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
SECTOR	Sustainable High Growth	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
	Cash	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
	Australian Bond	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
	Diversified Credit Income	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
	Listed Property	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
	Australian Shares	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
	International Shares	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
	Global Environmental Opportunities	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
	Australian Equity Income	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
	Global Companies in Asia	<input type="text"/>	<input type="text"/>	<input type="text"/>	%
TOTAL					<input type="text"/> <input type="text"/> <input type="text"/> %

SECTION 4 — Your declaration and signature

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

I declare that:

- The information provided on this form is true and correct.
- I request and consent to the transfer of my 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 tax and Centrelink 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 (DDMMYYYY)



RETURN YOUR FORM

Email: pensionsmailbox@unisuper.com.au
(completed forms that have been signed and dated can be scanned and emailed to us).

Mail: UniSuper
Level 1, 385 Bourke Street
Melbourne Vic 3000



NEED HELP?

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

Privacy statement

We recognise the importance of protecting your personal information and are committed to complying with our privacy law obligations.

We collect your personal information to administer your account, ensure you're eligible for insurance cover, provide you with UniSuper membership benefits, services and products, verify your identity and improve our products and services. You consent to our collecting sensitive information about you, where collecting that information is reasonably necessary for us to perform one or more of our functions or activities. We usually collect personal and sensitive information directly from you, however, it may also be collected from third parties, such as your employer.

We may also collect this information from you because we're required or authorised by or under an Australian law or a court/tribunal order to collect that information.

If you don't provide this information, we may not be able to administer your account, provide you with a product or service or you may be disadvantaged in some other way.

We may disclose your information to any service provider we engage (for example mail-houses, auditors, insurers, actuaries, lawyers and research consultants) to carry out or help us provide your membership benefits, services and products. This includes overseas entities. The countries we may disclose personal information to are Japan, Canada and the United States of America. Where information is transferred overseas, we'll seek to ensure the recipient of the data has security systems to prevent misuse, loss or unauthorised disclosure in line with Australian laws and standards.

Our Privacy Policy contains information about how you can access any personal information we hold, how to correct your information and how to make a complaint about a breach of the Privacy Act. It's available at unisuper.com.au or by calling us on **1800 331 685**.

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