

# Combine my super (full rollover) form



Complete this form to transfer the entire balance of your super from another fund to your UniSuper account. To arrange a partial rollover into UniSuper, please contact your other fund.

You can combine your super with our rollover tool at [unisuper.com.au/rollover](https://unisuper.com.au/rollover), or via your account online at [unisuper.com.au](https://unisuper.com.au).

## IMPORTANT INFORMATION

One form is required for each rollover into UniSuper from another previous fund.

## THINGS TO CONSIDER

- This transfer may close your other super account.
- Before combining your super, consider the possible effects this might have on things like the fees you pay, the conditions of your insurance and the tax on your super. There could be other effects too, so it's best to seek financial advice if you're unsure.

## SECTION 1 MEMBER DETAILS

- Please complete in BLACK or BLUE BALL POINT PEN using CAPITAL letters. Cross (X) where required.
- Please note all fields are mandatory apart from your tax file number (TFN).
- If you don't provide your tax file number you may pay more tax than you need to on your lump-sum withdrawal.

Please read information about providing your TFN at [unisuper.com.au/tfn](https://unisuper.com.au/tfn). You can also request a copy of that information by calling **1800 331 685**.

Member number

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

Title

 Mr  Mrs  Ms  Dr  Professor  Other 

Surname

Given name

Date of birth (DD/MM/YYYY)

Gender

 Male  Female

Daytime contact number

Email address

Your tax file number

I don't wish to quote my TFN. **Please note:** Your lump-sum withdrawal will have the maximum amount of tax deducted as required under tax law.

If you've changed your personal details (i.e. residential address and email address) since you last contacted us, please update your details by:

- logging in to your account at [unisuper.com.au](https://unisuper.com.au).
- completing a *Change of details form-super members* (available from [unisuper.com.au](https://unisuper.com.au)) or
- give us a call on **1800 331 685**.



## SECTION 2 OTHER FUND DETAILS

➤ Refer to the latest correspondence from your other fund to help you complete these details.

Membership/policy number  
of previous fund\*

Full name of previous fund\*

Please complete two of the following:

Australian Business Number (ABN)  
of previous fund

Unique Superannuation  
Identifier (USI)

Product name/ID

Phone number of previous fund

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

Suburb/Town

State

Post code

\*Mandatory field. If you do not complete all of the mandatory fields, there may be a delay in processing your request.

## SECTION 3 MEMBER DECLARATION AND SIGNATURE

➤ Please read this declaration before you sign and date or upload your form to MemberOnline.

I declare:

- the information 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 Balanced investment option which is the fund's default investment option and its MySuper offering.
- I consent to my tax file number (if provided) being disclosed for the purposes of consolidating my account.
- I consent to my personal information being used in accordance with UniSuper's Privacy Policy.

Signature

Date

DD

MM

YYYY

## WHEN WILL MY FORM BE PROCESSED?

If you've provided a correctly completed form (and any certified ID or other paperwork required), we'll aim to process your request as soon as possible. Not providing correct information may delay us processing your request. Please allow 3 - 5 business days for your form to arrive. We'll contact you if we have any queries in relation to your request.

## SELF-MANAGED SUPER FUNDS (SMSFS)

Rollovers from self-managed super funds (SMSFs) must be initiated by the SMSF administrator.

Any rollover amounts will need to be sent electronically via an approved SuperStream payment method. Your administrator will also need to notify UniSuper via an approved SuperStream channel. Please provide your administrator with the UniSuper details below to arrange a rollover from your SMSF.

**Fund:** UniSuper

**UniSuper USI:** 91 385 943 850 001

**UniSuper ABN:** 91 385 943 850

**Your UniSuper member number**

**The name of your UniSuper Product (Accumulation 1 or 2, Defined Benefit Division, Personal Account)**

## 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 into MemberOnline, the secure member-only section of our website or call us on **1800 331 685**.

## PRIVACY

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

Previous fund use only:

If applicable, make cheques payable to UniSuper Limited and send to:

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

UniSuper:

ABN 91 385 943 850

SFN 1302/509/40

USI 91385943850001

## Further information

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

- contact your employer's Superannuation Officer
- call us on **1800 331 685**, or
- visit our website at [unisuper.com.au](https://unisuper.com.au)

## Certified proof of identity

If you have provided UniSuper with your correct tax file number (TFN) we may be able to process your rollover and transfer request without additional proof of identity.

If your TFN cannot be validated the trustee of your previous fund may require you to provide additional proof of identity information or documents before the transfer can be processed.

## Returning your form

Mail to:

**UniSuper**

**Level 1, 385 Bourke Street**

**Melbourne VIC 3000**

Email to [enquiry@unisuper.com.au](mailto:enquiry@unisuper.com.au)

# Your guide to proof of identity

We take looking after your retirement savings very seriously—which is why you need to prove your identity (ID) before making withdrawals or other important changes to your account.

## Verify your identity online

Proving your identity online is quick and easy—you'll know as soon as your identity gets verified. Log in at [unisuper.com.au/memberonline](https://unisuper.com.au/memberonline) to get started. Only Australian residents with Australian documents currently living in Australia can verify their identity through MemberOnline.

You'll need one or more of the following valid documents:

- Australian passport
- Australian visa
- Australian citizenship certificate
- Australian birth certificate
- Australian driver's licence
- Medicare card
- Centrelink card
- State and Federal electoral roll details.

Make sure you've updated your current personal details with relevant government agencies before you begin the process of verifying your identity online. We use online government and public databases to securely verify your identity.

## Or send us certified copies of your ID

You can also send us certified copies of your ID. The following guide explains the types of documents we can accept and how to ensure they're correctly certified.

### ALLOW US TO VERIFY YOUR IDENTITY

In some cases and on some of our forms, we can verify your identity on your behalf if the document(s) you provide haven't been certified correctly or can't be read. All you need to do is give us consent by ticking the box on the applicable form—and we'll try to verify your identity electronically using those documents. We'll let you know if the process wasn't successful.

### Why provide your TFN?

Giving us your tax file number (TFN) means we can process rollover and transfer requests to another super fund without additional proof of identity. If your TFN can't be validated, or you want to transfer to a self-managed super fund or organise a benefit payment, you'll still need to give us certified copies of your ID.

Visit [unisuper.com.au/memberonline](https://unisuper.com.au/memberonline) to provide your TFN online.

### STEP 1: COLLECT ACCEPTABLE DOCUMENTS

We'll accept either one document from List A or two documents from List B.

#### LIST A

##### A certified copy of a:

- current driver licence
- current passport (Australian passports that haven't expired more than two years ago are also acceptable)

#### LIST B

##### A certified copy of a:

- birth certificate or birth extract
- Australian citizenship certificate
- a pension card issued by Centrelink that entitles the person to financial benefits.

##### And:

- Notice of Assessment from the Australian Taxation Office (less than 12 months old) containing your name and residential address
- letter from Centrelink regarding a government assistance payment
- rates notice from local council (less than 12 months old) containing your name and residential address
- electricity, gas or water bill dated within the past three months that contains your name and residential address.

## STEP 2: CERTIFY YOUR DOCUMENTS

Take your original document(s) and a clear photocopy of both sides of the original document to an authorised person.

### Your ID must be properly certified

The authorised person will need to:

1. sight the original document, and the copy, to ensure both documents are identical, and
2. write or stamp 'this is a true and correct copy of the original document I have sighted' or 'certified true copy', followed by their:
  - signature
  - printed name
  - qualification (e.g. Magistrate), and
  - date.

If you've changed your name or are signing on behalf of another member, prove the 'link' between you and the name change, or other person—use a certified copy of one of the following documents as well as your other certified ID.

PURPOSE	SUITABLE LINKING DOCUMENT
Change of name	<ul style="list-style-type: none"><li>▪ Marriage certificate</li><li>▪ Deed poll or change of name certificate from the Registry of Births, Deaths and Marriages</li></ul>
Signing on behalf of another member	<ul style="list-style-type: none"><li>▪ Power of Attorney</li><li>▪ Guardianship papers</li></ul>

When having your documents certified, remember:

- All pages must be certified.
- The copy of the document must be certified—not on a separate page attached to the document.
- Certified copies of your documents must have an original signature.
- Faxed or emailed copies won't be accepted.
- Documents not written in English must be accompanied by an English translation prepared by an accredited translator.
- Documents certified more than a year ago won't be accepted.

### Who can certify your documents

Some of the people authorised to certify IDs include:

1. A person currently licensed or registered under a State or Territory law to practise in one of the following occupations:
  - Architect
  - Nurse
  - Chiropractor
  - Occupational therapist
  - Conveyancer
  - Optometrist
  - Dentist
  - Patent or Trade marks attorney
  - Financial adviser or financial planner
  - Pharmacist
  - Legal practitioner
  - Physiotherapist
  - Medical practitioner
  - Psychologist
  - Midwife
  - Veterinary surgeon.
2. One of the following persons:
  - Teacher employed full-time at a school or tertiary education institution

- Agent of the Australian Postal Corporation who is in charge of, or a permanent employee with two or more years of continuous service with, an office supplying postal services to the public
- Bank, building society, credit union or finance company officer with two or more years of continuous service
- Clerk, Master, Registrar or Deputy Registrar of a court
- Judge of a court or a Magistrate
- Justice of the Peace
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants, the Institute of Public Accountants or the Association of Taxation and Management Accountants, or a Fellow of the National Tax Accountants' Association
- Notary public, and
- Police officer.

Visit the Attorney General's website for a full list of who can certify documents.

## Using foreign documents

These must be translated by an accredited translator (if they're not in English) and you must have the translated copies correctly certified by a person listed in the 'Members residing overseas' section below.

### Members residing overseas

If you live overseas, the following people are authorised to certify identification documents:

- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
- Employee of the Commonwealth or the Australian Trade Commission who is authorised and exercising his or her function in a country or place outside Australia.
- A person authorised as a notary public in a foreign country.

Your documents must be certified by a person with an Australian connection. We won't accept certifications by a someone licensed or registered to practise outside of Australia in an occupation listed above, or who holds a position in a foreign country—except for a foreign notary public.

### When will my form be processed?

If you've provided a correctly completed form (and any certified ID or other paperwork required), we'll aim to process your request as soon as possible. Not providing correct information may delay us processing your request. Please allow 3-5 business days for your form to arrive. We'll contact you if we have any queries in relation to your request.

### Returning your form

- Mail to UniSuper, Level 1, 385 Bourke Street, Melbourne VIC 3000
- Email to [enquiry@unisuper.com.au](mailto:enquiry@unisuper.com.au)

This information is of a general nature only and includes general advice. It has been prepared without taking into account your individual objectives, financial situation or needs. Before making any decision in relation to your UniSuper membership, you should consider your personal circumstances, the relevant product disclosure statement for your membership category and whether to consult a licensed financial adviser. This information is current as at November 2017 and is based on our understanding of legislation at that date. Information is subject to change. To the extent that this fact sheet contains information which is inconsistent with the UniSuper Trust Deed and Regulations (together the Trust Deed), the Trust Deed will prevail. Issued by: UniSuper Management Pty Ltd ABN 91 006 961 799, AFSL No. 235907 on behalf of UniSuper Limited the trustee of UniSuper, Level 1, 385 Bourke Street, Melbourne Vic 3000.

Fund: UniSuper, ABN 91 385 943 850 | Trustee: UniSuper Limited, ABN 54 006 027 121 AFSL 492806 | Date: February 2019 UNIS000F80 0219