

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, or via your account online at unisuper.com.au.

Important information

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



PROVIDING YOUR TAX FILE NUMBER (TFN)

Please read the important information about providing your tax file number at unisuper.com.au/tfn. You can also request a copy of that information, free of charge, by calling **1800 331 685**.

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.

Privacy information

UniSuper recognises the importance of protecting your personal information and is committed to complying with its privacy law obligations. For more information on how we collect and manage your information please refer to the Privacy statement at the end of this form.

SECTION 1 — Member details

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

Please note all fields are mandatory apart from your tax file number.

UniSuper member number

If you are unsure of your member 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 (DDMMYYYY) Gender Male Female

What phone number do you want us to call you on if there is a question we need to ask you regarding this form?

Contact number (during business hours)

Email address

@

Your tax file number

- I consent to UniSuper using my TFN to access the ATO's SuperMatch service to search for other super in my name.
- I do not wish to quote my TFN

form continues



SECTION 1 — Continued

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**.
- completing a *Change of details form-super members* (available from **unisuper.com.au**) or
- give us a call on **1800 331 685**.



To arrange a rollover from your SMSF, please contact the Administrator of your SMSF. They will need to send us a cheque, a Rollover Benefit Statement (form NAT70944 - available from the Australian Tax Office website www.ato.gov.au/forms) as well as supporting information when the cheque isn't in the name of your SMSF. This can be either:

A bank statement showing the funds have come from a bank account in the name of the SMSF

OR

A screen shot of the bank account's transaction history showing both the name of the SMSF and the amount of the cheque being drawn.

Please note: The tax consequences of transferring from a SMSF are complex and require consideration. We recommend you speak to a qualified financial adviser before transferring.

SECTION 2 — Other fund details



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

Your membership/policy number of previous fund*

Full name of previous fund*

Please complete two of the following:

1. Australian Business Number (ABN) of previous fund

2. Unique Superannuation Identifier (USI)

3. Product name/ID

Phone number of previous fund

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

Suburb/Town

State


Postcode

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



To arrange a partial rollover into UniSuper, please contact your other fund.

SECTION 3 — Member declaration and signature

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

- 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 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 (DDMMYYYY)



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**.



RETURNING YOUR FORM

→ Mail to UniSuper, Level 1, 385 Bourke Street, Melbourne VIC 3000

→ Email to enquiry@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.



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

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

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.

Privacy statement

UniSuper recognises the importance of protecting your personal information and we're committed to complying with our privacy law obligations.

We collect your personal information to administer your account, improve our products and services and to provide you with, and promote, UniSuper membership benefits, services and products. 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 are required or authorised by or under an Australian law or a court/tribunal order to collect that information.

If you do not provide this information, we may not be able to administer your account, or provide you with a product or service.

We may disclose your information to any service provider we engage (for example mail-houses, auditors, insurers, actuaries, lawyers) to carry out or assist us to provide your membership benefits, services and products. This includes overseas entities. Where information is transferred overseas, we will 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 may access any personal information held by us, how to correct your information and how to make a complaint about a breach of the Privacy Act. Our Privacy Policy is available from our website at [unisuper.com.au](https://www.unisuper.com.au) or by calling us on **1800 331 685**.

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 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 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	→ Marriage certificate → Deed poll or change of name certificate from the Registry of Births, Deaths and Marriages
Signing on behalf of another member	→ Power of Attorney → Guardianship papers

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
 - Chiropractor
 - Conveyancer
 - Dentist
 - Financial adviser or financial planner
 - Legal practitioner
 - Medical practitioner
 - Midwife
 - Nurse
 - Occupational therapist
 - Optometrist
 - Patent or Trade marks attorney
 - Pharmacist
 - Physiotherapist
 - Psychologist
 - 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

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

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