

Retirement income streams

Rollover your super form

Complete this form if you have super money in other funds and you want to transfer it to your Prime Super member account. Please complete in pen using **BLOCK** letters. Print 'X' to mark boxes where applicable. This form must be completed in full.



Please note: You must roll external funds into your super account **before** establishing an *allocated* income stream. You can however roll funds into the super component of your *transition to retirement (TTR)* account at any time. Please refer to the *Short-Form PDS – Retirement income streams* or *Prime Super's retirement options* brochure.

Office Use Only

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SECTION 1 – MEMBERSHIP DETAILS

Member Number <input type="text"/>	Date of Birth (DDMMYYYY) <input type="text"/>	Tax File Number <input type="text"/>
Surname <input type="text"/>	Title <input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Dr	
Given Names <input type="text"/>	Gender <input type="checkbox"/> Male <input type="checkbox"/> Female	
Other / previous names <input type="text"/>		
Residential Address <input type="text"/>		
Town/Suburb/City <input type="text"/>		
State <input type="text"/>		Postcode <input type="text"/>
Phone Number (BH) <input type="text"/>	Phone Number (AH) <input type="text"/>	Mobile Number <input type="text"/>
Email <input type="text"/>		

Previous name If you had a different name while a member of your previous Fund, please give details below.

Surname <input type="text"/>
Given names <input type="text"/>

Previous address If you know that the address held by your **FROM** fund is different to your current residential address, please give details below.

Residential Address <input type="text"/>		
Town/Suburb/City <input type="text"/>		
State <input type="text"/>	Postcode <input type="text"/>	



SECTION 2 – PROOF OF IDENTITY

From 1 July 2013 you will not have to provide proof of identity documents when rolling over funds from another super fund. Instead you may provide your TFN which we will validate with the ATO.

However, if the ATO is unable to validate your TFN you will be required to provide proof of identity documents. We will contact you if this is the case.

If you choose not to provide Prime Super with your TFN, you will need to provide proof of identity documents to Prime Super.

Details of the proof of identity requirements are available overleaf.

SECTION 3 – DETAILS OF YOUR OTHER FUND

Please note: You must complete a separate form for each account you want to transfer to Prime Super.

The details requested below can be found on any benefit statement sent to you by the Fund or by contacting the Fund directly.

Name of Superannuation Fund or Company where benefits are held

[illegible]

Member Number (refer to previous member statements)

[illegible]☐ No

Fund's ABN or SFN (Super Fund Number) if known **If YES**, what date did you cease employment with that employer?

[illegible]

Fund's ABN or SFN (Super Fund Number) if known **If YES**, what date did you cease employment with that employer?

[illegible]

Address of Superannuation Fund or Company

[illegible]

Town/Suburb/City _____ State _____ Postcode _____

[illegible]

Town/Suburb/City _____ State _____ Postcode _____

[illegible]

Town/Suburb/City _____ State _____ Postcode _____

[illegible]

SECTION 4 – AUTHORISATION

- I have fully read this form and the information completed is true and correct.
- I authorise the transfer of my benefits from my other fund named above to Prime Super.
- I authorise the transfer of any contributions still to be made by my previous employer which may be received after benefits have been transferred to Prime Super.
- I am aware I may ask my superannuation provider for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits, and do not require any further information.
- I approve the deduction of exit fees and the Government taxes (if any) from the benefits transferred (subject to legislative restrictions).
- I discharge the superannuation provider of my **FROM** fund of all further liability in respect of the benefits paid and transferred to my **TO** fund.
- I request and consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect to this transfer.
- I understand my personal information will be used in accordance with Prime Super's Privacy Policy (available at www.primesuper.com.au) which I have read and understood.

Full Name

[illegible]

Member Signature _____

Date (DDMMYYYY)

[illegible]

COMPLETING PROOF OF IDENTITY

If you choose not to provide Prime Super with your TFN, you will need to provide documentation with this request to prove you are the person to whom the superannuation entitlements belong.

ACCEPTABLE DOCUMENTS

The following documents may be used.

EITHER	OR		
One of the following documents only: <ul style="list-style-type: none"> driver's licence issued under State or Territory law passport 	One of the following documents: <ul style="list-style-type: none"> birth certificate or birth extract citizenship certificate issued by the Commonwealth pension card issued by Centrelink that entitles the person to financial benefits 	AND	One of the following documents: <ul style="list-style-type: none"> letter from Centrelink regarding a Government assistance payment notice issued by Commonwealth, State or Territory Government within the past twelve months or local council within the past 3 months, that contains your name and residential address. <p>For example:</p> <ul style="list-style-type: none"> Tax Office Notice of Assessment Rates notice from local council

Have you changed your name or are you signing on behalf of another person?

If you have changed your name or are signing on behalf of the applicant, you will need to provide a certified linking document. A linking document is a document that proves a relationship between two (or more) names.

The following table contains information about suitable linking documents.

Purpose	Suitable linking documents
Change of name	Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office.
Signed on behalf of the applicant	Guardianship papers or Power of Attorney

CERTIFICATION OF PERSONAL DOCUMENTS

All copied pages of ORIGINAL proof of identification documents (including any linking documents) need to be certified as true copies by any individual approved to do so (see below).

The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (eg Justice of the Peace, Australia Post employee, etc) and date.

The following persons can certify copies of the original as true and correct copies. This is not a complete list. For a full list of individuals who can certify documents, go to the Prime Super website at www.primesuper.com.au:

- a Prime Super Regional Manager (RM) or Client Service Consultant (CSC);
- a permanent employee of Australia Post with 2 or more years of continuous service;
- a finance company officer with 2 or more years of continuous service (with one or more finance companies);
- an officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having 2 or more years continuous service with one or more licensees;
- a notary public officer;
- a police officer;
- a registrar or deputy registrar of a court;
- a Justice of the Peace;
- a person enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia, as a legal practitioner;
- an Australian consular officer or an Australian diplomatic officer;
- a judge of a court;
- a magistrate; or
- a Chief Executive Officer of a Commonwealth court.

ADDITIONAL INFORMATION

What happens to my future employer contributions?

Using this form to transfer your benefits will not change the fund to which your employer pays your contributions (if you are still working and have a TTR account with the Fund) but may terminate your membership of the fund you are transferring your benefits **FROM**.

If you wish to change the fund into which your contributions (if applicable) are being paid, you will need to speak to your employer about choice of fund. For the appropriate forms and information about whether you are eligible to choose the fund to which your employer contributions are made, visit www.ato.gov.au/super or call the Australian Taxation Office on **13 10 20**.

Things you need to consider when transferring your superannuation

When you transfer your superannuation from a fund, your entitlements under that fund may cease. You need to consider all relevant information before you make a decision to transfer your superannuation from a fund. If you ask for information, your superannuation provider must give it to you. Some of the points you may consider are:

- **Fees** – your **FROM** fund must give you information about any exit or withdrawal fees. If you are not aware of the fees that may apply, you should contact your fund for further information before completing this form. The fees could include administration fees as well as exit or withdrawal fees. Prime Super does not charge establishment or contribution fees on transfer. Differences in fees funds charge can have a significant effect on what you will have to retire on. For example a 1% increase in fees may significantly reduce your final benefit.
- **Death and disability benefits** – your **FROM** fund may insure you against death, illness or an accident which leaves you unable to return to work. If you choose to leave their fund, you may lose any insurance entitlements you have. Other funds may not offer insurance, or may require you to pass a medical examination before they cover you. When considering a new fund, you may wish to check the costs and amount of any cover offered.
- If your **FROM** fund is not a public offer fund, you may not be able to rejoin that fund.

What happens if I do not quote my TFN?

If you are under age 60, you may wish to complete a *Tax File Number declaration* form and return it with this application form. This form allows us to determine the amount of PAYG tax that is to be deducted from your income stream payments.

It is not compulsory to complete the declaration form or supply your tax file number, but if you don't, PAYG tax will generally be deducted from your payments at the top marginal tax rate.

The Tax file number declaration form is produced by the Australian Taxation Office (ATO) (form ATO NAT 3092). You may request the form from the ATO directly. It is also available from post offices and some newsagents.

YOUR PRIVACY

The information you provide on this form is collected by and held for Prime Super by the fund Administrator, and may be disclosed to third parties who are involved in activities related to your membership or provided to lawfully authorised government agencies in accordance with the Australian Privacy Principles of the *Privacy Act 1988 (Cth)*. We only use the information for the purpose of administering your membership or related purposes. For further information about privacy or to obtain a free copy of our Privacy Policy, please visit our website www.primesuper.com.au, contact us on 1800 675 839, write to us at Locked Bag 5103, Parramatta, NSW 2124 or email us at administration@primesuper.com.au.

WHERE TO SEND THIS FORM

Once completed please return this form to us via mail, fax or email.

Mail Prime Super
Locked Bag 5103
Parramatta NSW 2124

Freecall 1800 675 839
Fax 1800 023 662
Email administration@primesuper.com.au

If you have any questions about this form or Prime Super please call us on **1800 675 839** (8.00am to 8.00pm Monday-Friday Sydney time).