

Superannuation rollover



Do you know you can rollover your super from other funds into Club Plus Super online or by phone?

You can do it yourself online at: supermatch.clubplussuper.com.au or through your myGov account. You can also call our Member Hotline on **1800 680 627** and we can organise the rollover for you.

If using this form, please complete in black ink with BLOCK letters. This request will be invalid if not signed and dated. Please return this completed form to: **Club Plus Super, Locked Bag 5007, Parramatta NSW 2124.**

Read the back of this form for instructions and other important information.

Section 1: Personal details

*Required field. If not completed, it may delay the processing of your application.

Title: Mr/Mrs/Ms/Miss/Other

*Date of birth (DD/MM/YYYY):

*Surname:

*Given name(s):

*Address:

Suburb

State

Postcode

*Phone number:

Email:

*Tax file number (TFN)

Under the Superannuation Industry (Supervision) Act 1993, you are not obliged to disclose your TFN, but there may be tax consequences.

See "Providing your TFN" on the next page.

Section 2: Fund details - please complete a separate form for each account you wish to transfer.

FROM Fund details

Fund name:

Member number:

Australian Business Number (ABN):

Unique Superannuation Identifier (USI):

TO Fund details

Fund name:

Club Plus Superannuation Scheme

Member number:

Australian Business Number (ABN):

95 275 115 088

Unique Superannuation Identifier (USI):

CLB0100AU

Section 3: Amount to be rolled over

Whole amount to Club Plus Super.

An amount of

\$

is to be rolled in.

Section 4: Proof of identity

For transfers between super funds, your **FROM** fund will confirm your identity with the Australian Taxation Office (ATO). Where a positive match is made, your benefit can be transferred to Club Plus Super. However, if a positive match cannot be made, your **FROM** fund may require you to provide certified copies of your proof of identification documents (including any linking documents if you have changed your name).

Contact us

member hotline: 1800 680 627
pension hotline: 1800 204 194
email: member@clubplussuper.com.au
website: clubplussuper.com.au

Club Plus Superannuation Pty Limited ABN 26 003 217 990, AFSL No. 245362
RSE Licence No. L0000529 as trustee of Club Plus Superannuation Scheme
ABN 95 275 115 088, RSE Registration No. R1000757

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Superannuation rollover (cont.)

Section 5: Privacy

The personal information provided on this form is collected by and held for Club Plus Super by the fund administrator Australian Administration Services (AAS) in accordance with the Australian Privacy Principles of the *Privacy Act 1988 (Cth)*, for the purpose of administering accounts and providing services associated with your membership of the Fund.

You should read the *Privacy Policy* at clubplussuper.com.au/privacy-policy before completing the form. Call us on **1800 680 627** for a hard copy of the Policy. The Policy contains information about how personal information is collected, used and disclosed, how you can correct your personal information, make a complaint about a privacy breach and other important information about safeguards in place to protect your personal information.

By providing your information, you acknowledge that you have read and understood the *Privacy Policy*.

Section 6: Authorisation

By signing this request form I am making the following statements:

- I acknowledge I have fully read this form and the information completed is true and correct.
- I am aware I may ask my super 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 discharge the super provider of my **FROM** fund of all further liability in respect of the benefits paid and transferred to Club Plus Super.
- I request and consent to the transfer of super as described above and authorise Club Plus Super to contact my **FROM** fund to obtain any details relevant to the transfer of my super benefit to Club Plus Super.
- I request and consent to the transfer of super as described above and authorise the superannuation provider of each fund to give effect to this transfer.
- I have considered where my employer super contributions are currently paid.
- I consent to my TFN being disclosed for the purposes of consolidating my account.

Member's signature

Date (DD/MM/YY)

Section 7: Important information

This transfer may close your account (in your **FROM** fund).

This form cannot be used to:

- transfer benefits if you don't know where your super is
- transfer benefits from multiple funds on this one form – a separate form must be completed for each fund
- change the fund to which your employer pays contributions
- open a super account with Club Plus Super
- transfer benefits under certain conditions or circumstances – for example, if there is a super agreement under the Family Law Act 1975 in place.

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 and may close the account you are transferring your benefits **FROM**.

To change the fund into which your contributions are being paid, you will need to advise your employer of your new choice.

A *Choice of Fund* form is available at clubplussuper.com.au/tools-forms or by contacting the Member Hotline on **1800 680 627**.

Things you need to consider when transferring your super

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

- **Fees** – your **FROM** fund must give you information about any fees that apply to your account. Club Plus Super will not charge you an entry fee on your deposit.

- **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 that fund, you may lose any insurance entitlements you have with them. You can transfer your insurance cover to Club Plus Super but you must do this before you submit this form. You may wish to check the costs and amount of any cover offered. Any cover you have with Club Plus Super can be viewed online in the Member Portal or on your annual statement.

Providing your Tax File Number (TFN)

Under the Superannuation Industry (Supervision) Act 1993, your super fund is authorised to collect, use and disclose your TFN, which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change.

The trustee of your super fund may disclose your TFN to another super provider, when your benefits are being transferred, unless you request the trustee of your super fund in writing that your TFN not be disclosed to any other super provider.

Declining to quote your TFN to the trustee of your super fund is not an offence. However giving your TFN to your super fund will have the following advantages:

- your super fund will be able to accept all permitted types of contributions to your account/s;
- other than the tax that may ordinarily apply, you will not pay more tax than you need to - this affects both contributions to your super and benefit payments when you start drawing down your super benefits; and
- it will make it much easier to find different super accounts in your name so that you receive all your super benefits when you retire.