

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.

Important information

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



PROVIDING YOUR TAX FILE NUMBER (TFN)

The Trustee is authorised and required to ask you for your TFN by tax law and in accordance with the *Superannuation Industry (Supervision) Act 1993*. Your TFN will only be used for lawful purposes, which include:

- finding and combining your superannuation benefits where insufficient information is available;
- providing information to the Australian Taxation Office, for example when you receive a benefit, to validate initial registration information associated with first employer contribution using SuperTICK, if you are a lost member or have unclaimed benefits;
- verifying you are the person to whom the super entitlements belong prior to transferring your benefit to another super fund; and
- providing information to the Trustee of another super fund when your benefits are being transferred, unless you advise us in writing that you do not wish your TFN to be passed on.

It is not an offence not to quote your TFN, however, providing your TFN will have the following advantages (which may not otherwise apply):

- we will generally be able to accept all types of contributions to your accounts;
- the tax on contributions to your super accounts will not increase;
- other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your super benefits; and
- it will make it much easier to identify you as the person to whom the super benefits belong and to trace different super accounts in your name so that you receive all your super benefits when you retire.

Things to consider

- This transfer may close your other super account.
- If your other fund will charge you any exit or withdrawal fees.
- If you choose to leave your other fund, you may lose any insurance entitlements you have. You may be able to transfer your cover to UniSuper. To apply please complete the *Transfer of insurance application form* which is available from our website. Make sure you receive confirmation from us that your insurance will be transferred **before** completing this form.

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)

form continues >



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.

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 the 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.

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

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 or by calling us on **1800 331 685**.



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