

# Combine your super

Request to transfer (rollover) the whole or a partial balance of your other super account to AustralianSuper

Please complete in pen using CAPITAL letters and print (X) to mark boxes where applicable. Form must be completed in full. If you want to combine super from multiple accounts, you'll need to complete a separate form with original signatures for each account you wish to combine. Alternatively you can combine multiple accounts online at [australiansuper.com/combine](http://australiansuper.com/combine)

## 1 Fill in your personal details

Last name

Mr  Mrs  Ms  Miss  Dr

First name/s

Date of birth

Other/previous names

Street address

Suburb  State  Postcode

Previous street address (if details with your FROM fund are different to those above)

Suburb  State  Postcode

Telephone (business hours)  Telephone (after hours)  Mobile

Male  Female  Email

If I provide my email address and/or phone number, I'm consenting to AustralianSuper communicating with me via email, my online account, mobile app and phone as appropriate. I understand I can change my communication preferences through my online account or by calling **1300 300 273**.

## 2 Provide Super account details

### FROM:

**Other super fund**

Fund name

Fund phone number  Member or account number

Australian Business Number (ABN)  Unique Superannuation Identifier (USI)

**Self-managed super fund (SMSF)**

SMSF name  Australian Business Number (ABN)

Electronic Service Address (ESA)

### TO: Fund name

**AUSTRALIANSUPER**

### Member number

### Phone number

**1 3 0 0 3 0 0 2 7 3**

### Australian Business Number (ABN)

**6 5 7 1 4 3 9 4 8 9 8**

### Unique Superannuation Identifier (USI)

**S T A 0 1 0 0 A U**

## 3 Is this a whole or partial balance transfer?

- Whole - I'd like to transfer the whole balance of this account. This means you're asking us to close your other super account.
- Partial - I'd like to transfer a nominated amount: \$ , , .00

Before combining (consolidating) super from your other super account, you should consider any fees and costs that may apply and the impact on your insurance cover and benefits. When you combine your super account, any insurance cover you have with your other super fund doesn't automatically transfer. If you want to transfer your cover, you'll need to do this before you combine your super. You should wait until you've received written confirmation from us that your cover has transferred before combining your super. For more information about transferring cover, read the *Insurance in your super* guide for your division at [australiansuper.com/InsuranceGuide](http://australiansuper.com/InsuranceGuide) If you wish to claim a tax deduction for personal super contributions, you must lodge a notice of intent to claim a tax deduction with your other fund, before you combine your super.

## 4 Your tax file number

Use my Tax File Number (TFN) to process my super transfer.

Enter your TFN here

By giving us your TFN, you are authorising us to give this information to your other super fund. They'll confirm your ID with the Australian Taxation Office. It's optional to provide your Tax File Number (TFN) but there are several advantages if you do. See 'Providing your TFN' below for more information.

## 5 Sign this form

By signing this request form I'm making the following statements:

- I'm 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 such as insurance cover, 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 AustralianSuper.
- I authorise AustralianSuper (or its agents) to contact my other super fund regarding this request to combine my super from that fund into my AustralianSuper account only.
- I'm aware that once my completed form is received by AustralianSuper, it will usually be processed within three business days.
- I've read the Privacy Collection Statement below and I understand how AustralianSuper will use my personal information. To the best of my knowledge, the information I have provided on this form is correct.
- If I've provided my email address and/or phone number, I consent to AustralianSuper sending me information about my account, AustralianSuper's products and services and marketing communications, including third-party products and services, via email, my online account, SMS, mobile app or phone, as appropriate and in accordance with AustralianSuper's Privacy Policy and my existing communication preferences. I understand I can change my communication preferences at any time by calling AustralianSuper on **1300 300 273** or through the My communication preferences section of my online account.

I request and consent to the transfer of super as described within this form and authorise the super provider of each fund to give effect to this transfer.

You need to sign here

Date

Print name

### Important information

1. You can't nominate a balance transfer date. The balance transfer will start within three business days of the date we receive your completed application.
2. If you want to transfer any insurance cover you have with your other super fund to AustralianSuper, you'll need to complete an *Insurance transfer* form before you combine your super. Download a copy at [australiansuper.com/InsuranceForms](http://australiansuper.com/InsuranceForms)
3. If you're making a whole balance transfer, check any remaining employer contributions have been received and no future payments will be made into your FROM account.
4. This form doesn't:
  - transfer super benefits if you don't know where your super is
  - transfer benefits from multiple funds on one form - you must use a separate form for each fund you wish to transfer

- change the fund to which your employer pays your contributions
- open a new super account, or
- transfer benefits under certain conditions or circumstances, for example if there is a superannuation agreement under the Family Law Act 1975 in place.



### Providing your TFN

We're authorised under super law to collect, use and disclose your Tax File Number (TFN). You don't have to provide your TFN, but if we have it, we'll be able to accept all types of contributions into your account, you won't pay more tax than you need to and it'll be easier to find your super. If you transfer your super to another fund, we'll give them your TFN unless you tell us not to in writing. Visit [australiansuper.com/RefTFN](http://australiansuper.com/RefTFN) for more details.

### Privacy Collection Statement

Please read this Privacy Collection Statement to see how AustralianSuper uses your personal information.

AustralianSuper Pty Ltd (ABN 94 006 457 987) of GPO Box 1901, Melbourne, Victoria 3001, collects your personal information (PI) to operate your super account (including insurance), improve our products and services and keep you informed. If we can't collect your PI we may not be able to provide these services. PI is collected from you but sometimes from third parties like your employer. We will only share your PI where necessary to perform our activities with our administrator (Australian Administration Services Pty Ltd, Link Group), service providers, as required by law or court/tribunal order, or with your permission. Your PI may be accessed overseas by some of our service providers. A list of countries can be found at the URL below. Our Privacy Policy details how to access and change your PI, as well as the privacy complaints process. For complete details go to [australiansuper.com/privacy](http://australiansuper.com/privacy) or call us on **1300 300 273**.



To combine other super accounts into AustralianSuper, go to [australiansuper.com/combine](http://australiansuper.com/combine)