

Rollover request to transfer whole balance of superannuation into legalsuper

Return this completed form to:

legalsuper
 Locked Bag 5081
 Parramatta NSW 2124
 Phone: 1800 060 312

By completing this form, you will initiate a rollover request to transfer the whole balance of your super benefits to legalsuper. This form can not be used to transfer part of the balance of your super benefits. If you have multiple accounts to consolidate, you need to complete a separate form for each account.

This form will not change the fund to which your employer pays your contributions. The Standard choice form must be used by you to change funds.

Before you decide to consolidate, make sure you are informed. Check what insurance cover you may lose with the other fund. You may be able to transfer this cover to legalsuper.

Please use **BLOCK letters and black ink** when completing this form.

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

Personal details

Mr Mrs Ms Miss Other

*Surname

*Given Names

Other/Previous Names

*Date of birth (dd/mm/yyyy)

Tax file number

Under the *Superannuation Industry (Supervision) Act 1993*, you are not obliged to disclose your tax file number, but there may advantages if you do.

*Sex
 Male Female

Telephone Number

Mobile Number

*Residential Address

*Town or Suburb

*State *Postcode

Previous Address

Town or Suburb

State Postcode

Fund details

FROM (Transferring fund)

*Fund name

Fund Telephone Number

*Member or account number

*Australian business number (ABN)

*Unique Superannuation identifier

For SMSFs only

FROM (Transferring fund)

*Account name

*BSB Number *Account Number

*Electronic service address

Note: Please provide a copy of your SMSF bank statement, or your SMSF welcome letter from your bank so we can verify that the above details you have provided are correct. These documents must not be more than 12 months old.

TO (Receiving fund)

Fund name
 L E G A L S U P E R

Fund Telephone Number
 1 8 0 0 0 6 0 3 1 2

*Member or account number

Australian business number (ABN)
 6 0 3 4 6 0 7 8 8 7 9

Unique Superannuation identifier
 L I S O 1 0 0 A U

Authorisation

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

- I declare I have fully read this form and the information completed is true and correct.
- 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 have obtained or do not require such information.
- I consent to my tax file number being disclosed for the purposes of consolidating my account.
- I discharge the superannuation provider of my **FROM** fund of all further liability in respect of the benefits paid and transferred to legalsuper.

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.

*Signature

*Date (dd/mm/yyyy)

IMPORTANT INFORMATION

This transfer may close your account - you will need to check this with your **FROM** fund.

This form can not be used to:

- transfer part of the balance of your super benefits
- 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 you wish to transfer super from
- change the fund to which your employer pays contributions on your behalf
- open a super account
- 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**.

If you wish to change the fund into which your employer contributions are being paid, you will need to complete and provide your employer with the legalsuper Choice of Fund form along with the Letter of Compliance. Visit legalsuper.com.au/forms

Things you need to consider when transferring your superannuation

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**.

If you wish to change the fund into which your employer contributions are being paid, you will need to complete and provide your employer with the legalsuper Choice of Fund form along with the Letter of Compliance. Visit legalsuper.com.au/forms

Some of the points you may consider are:

- **Fees** - your **FROM** fund must give you information about any withdrawal fees. If you are not aware of the fees that may apply, you should contact your **FROM** fund for further information before completing this form. The fees could include administration fees or withdrawal fees. Differences in fees that funds charge can have a significant effect on the super 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 your current 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 legalsuper, you should consider the amount of cover offered and the amount of cost associated with this cover.

What happens if I don't provide my Tax File Number (TFN)?

Under the *Superannuation Industry (Supervision) Act 1993*, legalsuper is authorised to collect, use and disclose your TFN.

legalsuper may disclose your TFN to another superannuation provider, when your benefits are being transferred, unless you request your super fund, in writing, not to disclose your TFN to any other superannuation provider.

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

- we 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 superannuation and benefit payments when you start drawing down your superannuation benefits; and
- it will make it much easier to find different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

You are not required to provide your TFN however, if you do not provide your TFN, you may be taxed at the highest marginal tax rate, plus the Medicare levy, on contributions made to your account in the year, compared to the concessional tax rate of 15% and you will not be able to make personal contributions to your super account. legalsuper may deduct the additional tax from your account.

Choosing to provide your TFN will make it easier to track your super in the future.

Please send the original of this form to:

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Parramatta NSW 2124