

Rollover Request

Full account roll-in to Telstra Super

Please print with black pen

Please complete this form to roll your entire super benefit from an external super fund into Telstra Super.

Do not complete this form if you:

- expect that further employer contributions may be made to your external fund, for example, if you may work for your old employer again.
- have taken an option in your external fund to continue your insurance cover for a specified period, which has not yet expired.
- wish to transfer only part of your benefit.
- do not know where your super benefit is.
- have a super agreement under the Family Law Act 1975 in place.
- do not have an existing Telstra Super account.
- wish to change the super fund to which your employer contributes.

If you require any further information from Telstra Super before completing this form, please call our Member Services Consultants on **1300 033 166** between **8.00am and 5.30pm** (Melbourne time), Monday to Friday.

Things to consider before rolling your super into Telstra Super**Fees**

- Telstra Super does not charge any contribution or entry fees, nor do we charge a fee for the withdrawal of monies or exiting our fund.
- Your external fund must give you any information about exit or withdrawal fees. If you do not know what fees are associated with the withdrawal of monies from this fund you should contact them for more information.
- Administration fees and investment management fees can have a significant impact on your retirement benefit. For example, a 1% increase in fees may significantly reduce your final benefit. Full details of Telstra Super's fees and charges can be found at www.telstrasuper.com.au or by calling **1300 033 166**.

Insurance

- Your external fund may currently insure you against death, temporary or permanent disablement, rolling out may mean you lose any insurance entitlements you have in that fund.
- Telstra Super offers members a range of insurance options. Full details of the insurance options offered by Telstra Super can be found at www.telstrasuper.com.au or by calling **1300 033 166**.

Future Contributions

Rolling your money into Telstra Super will not change the fund to which your employer contributes and may close your external super account. To change the super fund your employer contributes to, you will need to speak to your employer about Choice. More information about Choice can be found at www.superchoice.gov.au or by calling the Australian Taxation Office on 13 10 20.

Instructions for completing this form

Please complete the following form with a black pen. Before sending this form to Telstra Super, please check that you have:

- read the form in its entirety, including the important information overleaf.
- considered where your future contributions will be paid.
- completed all the mandatory fields on the form, * denotes a mandatory field.
- signed and dated the form.
- attached the certified documentation including any required linking documents.

Your details

In accordance with Government legislation, * indicates mandatory fields. If you do not complete all mandatory fields there may be a delay in processing your request.

*Full name

*Current Address

*Suburb

*State

*Postcode

*Member number

*Gender Male Female

*Date of birth / /

*Home phone no.

*Business phone no.

Email address

*Previous Address

*Suburb

*State

*Postcode

External fund details

In accordance with Government legislation, if you have multiple accounts with this fund, you must use a separate form for each account you wish to transfer.

To complete these details use your last member statement or contact your external fund.

*Name of fund

Address of fund

*Member/account no.

Phone no.

Australian Business Number (ABN)

Superannuation Product Identification Number (SPIN)

Telstra Super SPIN TLS0100AU ABN 85 502 108 833

Authorisation

You must sign the authorisation before sending the form and proof of identity documents to Telstra Super.

Proof of identity

See important information on Proof of Identity (opposite).

- I have attached a certified copy of my driver's licence or passport. **OR**
- I have attached certified copies of both:
- Birth/Citizenship Certificate or Centrelink Pension Card, and
 - Centrelink payment letter or Government or eligible local council notice.

Tax File Number (TFN) declaration

See important information on TFN provision (opposite).

I acknowledge that I have read the information below regarding TFN provision and understand that Telstra Super will not use my TFN for any unlawful purpose.

My TFN is

Authorisation

By signing this authorisation, I am making the following statements:

- I have fully read this form and the information completed is true and correct.
- I know that I may ask my super fund 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 I do not need further information to sign this authorisation.
- If I am a defined benefit member without a Voluntary Accumulation Account, one will be opened for me and will incur an administration fee of \$1 a week. This account will be invested in the default option for my age until I advise otherwise.

I request the transfer of my super benefit as detailed in this form and authorise both the external fund and Telstra Super to give effect to this transfer.

*Name

*Signature

Date / /

**Please return completed form to Telstra Super:
Telstra Super Pty Ltd, PO Box 14309, MELBOURNE VIC 8001**

Important information

Proof of identity requirements

Government legislation requires that proof of identity is provided with any superannuation benefit transfer requests. This requirement can be met by providing certified copies of original proof of identification documents.

Acceptable documents

Either

One of the following current documents only:

- driver's licence issued under State or Territory law
- passport

OR

One of the following documents:

- birth certificate or birth extract
- citizenship certificate
- Centrelink pension card

AND one of the following documents:

- letter from Centrelink regarding a Government assistance payment
- notice issued by Commonwealth, State or Territory Government or local council within the past 12 months that contains your name and residential address, such as Australian Tax Office assessment, local council rates notice

Individuals approved to certify copies

Individuals authorised to certify copies must sight the original and the copy, confirm that the documents are identical, then write or stamp 'certified true copy' followed by their signature, their name, their qualification and the date.

The following individuals can certify documents as true and correct copies:

- a permanent employee of Australia Post with at least 5 years continuous service
- a finance company officer with at least 5 years continuous service (with one or more finance companies)
- an officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), with 5 years continuous service with one or more licensees
- a notary public officer
- a police officer
- a registrar or deputy registrar of a court, or 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, or a magistrate
- a Chief Executive Officer of a Commonwealth court.

If you have changed your name or are signing on behalf of another person

If you have changed your name or are signing on behalf of another person, you will need to provide proof of the relationship in the form of a certified copy of a linking document, in addition to your proof of identity. Acceptable linking documents:

For a change of name:

- marriage certificate
- deed poll
- change of name certificate from the Births, Deaths and Marriages Registration Office.

For signing on behalf of another person:

- guardianship papers
- Power of Attorney

TFN provision

Under the Superannuation Industry (Supervision) Act 1993, Telstra Super is authorised to collect your TFN. If provided, your TFN will only be used for lawful purposes, which may change in the future. Your TFN may be disclosed to another super provider during this transfer unless you advise in writing that your TFN is not to be disclosed to any other trustee. It is not an offence not to supply your TFN, however if you do not provide your TFN it may be more difficult to locate, identify or amalgamate any super benefits you have not claimed and:

- pre-tax contributions will be taxed at 46.5%, instead of the concessional tax rate of 15%. Your fund may deduct this additional tax from your account.
- your super funds cannot accept post-tax contributions on your behalf.

These consequences may change in the future.

Telstra Super Pty Ltd complies with the Privacy Act 1988 (Commonwealth). For further information on privacy please contact the Privacy Officer on 1300 033 166 or download a copy of our Privacy Policy or Access and Correction Policy from www.telstrasuper.com.au

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Telstra Super Pty Ltd ABN 86 007 422 522, AFSL 236709 is the Trustee of the Telstra Superannuation Scheme (Telstra Super) ABN 85 502 108 833.