

Consolidate your super

Complete this form to consolidate your entire super benefit from an external super fund to TelstraSuper.

RED SECTIONS FOR YOUR INFORMATION

GREY SECTIONS TO FILL OUT

Save time! Complete in **SuperOnline**

Before you start

- Read the Important Information section at the end of this form to help you complete your application
- If you have multiple super accounts you must complete a separate form for each account you wish to consolidate (this is a legislative requirement)
- You can re-direct to TelstraSuper any employer Superannuation Guarantee (SG) contributions or member pre-tax (concessional) contributions you may have that are currently going to your other super fund(s)
- Any insurance you may have with your other fund(s) will be cancelled on consolidation of your super to TelstraSuper
- You may be eligible to apply to transfer any existing Death and Total & Permanent Disablement (TPD) insurance into TelstraSuper (not Income Protection cover). To do this, you must apply and have your application accepted in writing **before** you consolidate. For a **Transfer External Insurance Application** form visit telstrasuper.com.au/forms
- If you are signing this form on behalf of another person, you will need to complete and attach an **Authorised Third Party Representative Identification** form available at telstrasuper.com.au/forms and include any certified documents as required.

Do not complete this form if you:

- have any Death and TPD insurance you wish to transfer into TelstraSuper from your external super fund - complete a **Transfer External Insurance Application** form and wait for written confirmation from TelstraSuper before consolidating
- wish to transfer only part of your benefit into TelstraSuper (use the **Rollover Request** form for this)
- do not have, or are not opening, a TelstraSuper account
- have recently consolidated your super via your SuperOnline account.

1. Your details currently held by TelstraSuper

Title	Mr	Mrs	Miss	Ms	Other
Surname*					Member number*
Given name(s)*					Date of birth*
Residential address*					
Suburb*			State*		Postcode*
Mobile/contact no.*			Email*		

* Mandatory fields.

Note: We'll be unable to process this form if your contact or personal details are different to the details we currently hold for you. To check and/or update your details before you submit this form you can:

- log into your SuperOnline account, or
- call us on **1300 033 166**, or
- complete a **Change of contact** details form to update your contact details or a **Change of member details** form to update your personal details available at telstrasuper.com.au/forms and submit it with this form.

YOUR
BASIC
INFO
↓



Simplify your super for your chance to *win \$500!**

Combine your accounts today

Eligible members who transfer their superannuation from another superannuation fund into TelstraSuper during the Competition Period (1 March – 31 March 2024) will automatically be entered into the competition draw.

*You agree that by consolidating your superannuation, you will automatically be entered into the consolidation competition draw. Before consolidating your superannuation and being entered into this competition, you warrant that you have read, understood and agree to be bound by the Competition Terms & Conditions attached.

2. External fund details (complete all fields)

Name of fund

Address of fund

Member/account no.

ABN

Unique Superannuation Identifier (USI)

Note: TelstraSuper details: SPIN TLS0100AU ABN 85 502 108 833

3. Other insurance (must be completed)

You must tick this box even if you don't have insurance with the external super fund you're transferring from.

I understand any insurance I currently have with my external super fund will be cancelled on consolidation of my super to TelstraSuper.

Note: Do not complete this form if you have any Death and TPD insurance you wish to transfer into TelstraSuper from your external super fund. Complete a **Transfer External Insurance Application** form and wait for written confirmation from TelstraSuper **before** consolidating.

4. Your declaration and signature

By signing this form, I:

- declare that I have fully read this form and the Important Information section and have considered the implications of consolidating my external accounts to TelstraSuper including any impact on benefits (e.g. insurance)
- acknowledge that all the information I have provided on this form is true and correct
- understand that before I consolidate to TelstraSuper I may ask my external 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 submit this authorisation
- discharge the external fund of all further liability in respect of the benefits paid and transferred to TelstraSuper
- acknowledge that I have read the Privacy Policy and Privacy Collection Statement and I understand and consent to how TelstraSuper will use my personal information
- authorise TelstraSuper to contact the external fund if required to follow up the progress of this transfer
- understand that if I'm a defined benefit member without a Voluntary Accumulation Account, one will be opened for me and will be invested in the default option for my age until I advise otherwise
- request the transfer of my super benefit as detailed in this form and authorise both the external fund and TelstraSuper to give effect to this transfer
- acknowledge that any insurance I have with the external fund will be cancelled on consolidation of my super to TelstraSuper
- understand that, if the details on the form differ from the details that TelstraSuper holds about me, my form will not be processed and TelstraSuper will not be responsible for delays or other consequences due to the details not matching.
- acknowledge and agree that if I transfer my super from another super fund into TelstraSuper during the month of March 2024, I will be automatically entered into TelstraSuper's consolidation competition. Before consolidating my superannuation and being entered into this competition, I warrant that I have read, understood and agree to be bound by the Competition Terms & Conditions attached.

Each person who signs this form as a guardian, administrator or attorney for the member named in this form represents and warrants by signing this form that he or she has been lawfully appointed as guardian, administrator or attorney (as the case may be) for that member and that appointment remains valid and current at the date hereof and has not been revoked.

Name

Signature

X

Date

If the signatory is not the member, please state your capacity:

Guardian

Administrator

Attorney



Please return completed form to TelstraSuper

PO Box 14309, MELBOURNE VIC 8001 or email to contact@telstrasuper.com.au
(if emailing please include your member number in the subject line)

Before sending this form to TelstraSuper, please check that you have:

- ☒ read the form in its entirety, including the Important Information section
- ☒ considered where your future contributions will be paid
- ☒ received written confirmation that the transfer of your Death and Total & Permanent Disablement cover has been accepted (if applicable)
- ☒ signed and dated the form.



Insurance

Your external fund may currently insure you against death and/or temporary and/or permanent disablement. Transferring out may mean you lose any insurance entitlements you have in that fund, however TelstraSuper offers the option to transfer external Death only or Death & Total and Permanent Disability (not Income Protection) cover to your TelstraSuper account. To do this, you must apply and have your application accepted in writing **before** you consolidate.

TelstraSuper offers members a range of insurance options. Full details of TelstraSuper's insurance options and how to transfer external insurance cover to your TelstraSuper account, can be found at telstrasuper.com.au or by calling **1300 033 166**.

Have you changed your name or are you signing a document on behalf of another person?

If you have changed your name or are signing a document on behalf of another person, you must provide evidence as follows:

Change of name

After marriage/separation/divorce

Certified copy of the following:

- your birth certificate
- your marriage certificate
- your divorce certificate (if applicable)
- If you were born overseas and/or married overseas you must also provide a certified copy of your change of name certificate issued by an Australian State or Territory Births, Deaths and Marriages Registry.

Any other reason

- A certified copy of your change of name certificate issued by an Australian State or Territory Births, Deaths and Marriages Registry.

Signing a document on behalf of another person

You must complete and attach an **Authorised Third Party Representative Identification** form including a certified copy of the document by which you are authorised to sign on behalf of another person:

- power of attorney document
- guardianship order
- administration order.

For an **Authorised Third Party Representative Identification** form go to telstrasuper.com.au/forms

A complete list of acceptable proof of identity documents is available on our website at telstrasuper.com.au/proofofid

How to get your proof of identity documents certified

- Photocopy your identity documents (if you're using your driver's licence, photocopy both sides)
- Take the photocopies and the original documents to a person authorised to certify proof of identity documents:
 - If living in Australia: This includes pharmacists, police officers or a Justice of the Peace.
 - If living overseas: This must be a person who is an Australian Consular Officer or a foreign notary public.

For a complete list of people authorised to certify proof of identity documents in Australia and overseas visit telstrasuper.com.au/proofofid

To certify your documents, the authorised person must:

- sight the original and the copy
- confirm that the documents are identical
- write or stamp on the photocopy:
 - 'I certify that this is a true and correct copy of the original document I have sighted', and
 - their name, qualification, business address, and registration number (if applicable), and
 - their signature and date on all pages of the photocopy.

You must keep the original proof of identity documents and send in the certified copy of your proof of identity documents.

Example



I certify that this is a true and correct copy of the original document I have sighted.

J. Sample

Joan Sample
11 Same St, SOMETOWN VIC 3009
Justice of the Peace
Reg no: 26587
1 March 2020



Fees and costs

- TelstraSuper does not charge an exit fee for the withdrawal of monies or exiting our fund
- A buy-sell spread may apply to member-initiated transactions. Please refer to the **Additional Information About Your Super** guide for more information
- 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 your other fund you should contact them for more information
- Fees and costs can have a significant impact on your retirement benefit. Find full details of TelstraSuper's fees and costs at **telstrasuper.com.au** or by calling **1300 033 166**.

Investment

Your transfer will be invested in the investment option you have chosen (excluding Direct Access). If you have not made a choice, your transfer will be invested in TelstraSuper's MySuper arrangement if you're an accumulation member, or the defined benefit default investment option if you're a defined benefit member. More information on investment options can be found at **telstrasuper.com.au**

Future contributions

If your employer or any other person makes contributions on your behalf to the external fund and you wish those contributions to be made to a different fund, such as TelstraSuper, you must give them an appropriate direction to do so. To change the super fund your employer contributes to, speak to your employer about Choice. More information about Choice can be found at www.ato.gov.au or by calling the ATO on 13 10 20.



Terms & Conditions March 2024

1. The Promoter is Telstra Super Pty Ltd, ABN 86 007 422 522, AFSL 236709 as the trustee of the Telstra Superannuation Scheme (TelstraSuper) of Level 10, 130 Lonsdale St, Melbourne, VIC 3000.
2. This competition is open to TelstraSuper members with a Personal Plus or Corporate Plus account eligible to receive a roll in from an external superannuation fund. Employees of the Promoter or their immediate families along with the Promoter, associated companies and agencies are ineligible to participate.
3. Eligible TelstraSuper members who consolidate their superannuation from another superannuation fund into TelstraSuper during the Competition Period will automatically be entered into the competition. A maximum of one entry per participant is permitted and only one prize per participant can be won.
4. Before consolidating your superannuation and participating in this competition, you warrant that you have read, understood and agree to be bound by these Competition Terms & Conditions.
5. Participation in this competition is free.
6. The competition is a game of chance and each valid entry will enter the draw for an equal and fair chance to be randomly selected by the Promoter as a competition winner.
7. This competition commences on 1 March 2024 at 12am (Melbourne time) and concludes on 31 March 2024 at 11:59pm (Melbourne time) (Competition Period).
8. The Promoter assumes no responsibility for any error, omission, interruption or delay in the operation or transmission of any communication sent to or by the Promoter, or any participant, whether caused by communication networks or lines, computer systems, software or internet service providers, congestion on any carrier network or otherwise.
9. The Promoter takes no responsibility for late or misdirected entries or for any delays or failures in any telecommunication service or equipment of any party.
10. The Promoter will draw 6 winners from all eligible participants as at 11:59pm on 31 March 2024 (Melbourne time). A random manual prize draw will take place at TelstraSuper, Level 10, 130 Lonsdale St, Melbourne, VIC 3000 at 10:00 am on 18 April 2024.
11. The 6 prize winners will each receive a \$500 VISA Gift Card.
12. The Promoter will publish the winners' names on the Promoter's website. A list of the drawn prizes and their winners will be displayed on the Promoter's website for at least 7 after the day on which the prizes were drawn.
13. The prize winners will be notified by phone and in writing via mail or email within 7 days of the prize draw that they have won and of the method for delivering the prize.
14. If the Promoter's representative is unable to contact a winner by phone, email or letter after reasonable efforts have been made, the Promoter will redraw the prize from the competition entries on Friday, 26 April 2024 until a winner has been contacted.
15. The prize will be mailed/e-mailed to the prize winner within 28 days of the prize draw.
16. If there are no prize winners, or the prize winners cannot be found, the Promoter will publish this on its website.
17. If the prize specified becomes unavailable for any reason which is out of the Promoter's control, then a similar prize of equal value will be awarded in lieu.
18. The prize is not transferable or redeemable for cash. It is up to the prize winner to use the value of the gift card before the expiry date. Any unused balance will not be refunded or credited when the card expires.
19. In addition to Condition 12, any personal information provided to the Promoter will be treated in accordance with the Promoter's Privacy Policy, found at telstrasuper.com.au/legal/privacy
20. To the maximum extent permitted by law, the Promoter will not be held liable for any loss or damage whatsoever which is suffered (including but not limited to direct or consequential loss) or for any personal injury suffered or sustained in connection with any prize except for any liability which cannot be excluded by law.
21. In relation to any disputes arising from the competition, the Promoter's decision in relation to any aspect of the competition is final and binding and no correspondence will be entered into.
22. A participant claiming to be a prize winner must provide proof of identity if required by the Promoter. Each prize winner may also be required to sign a document indicating they have received their prize at the time of distribution.
23. Each participant is responsible for notifying the Promoter of any change to the participant's contact details during and after the Competition Period.