

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.

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

YOUR
BASIC
INFO
↓

YOUR
OLD
FUND
↓



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.

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.