

# Transfer your super



## IMPORTANT NOTES

Use this form to request to transfer part of, or your full superannuation balance from another fund to your CareSuper account.

To let your employer know you'd like your super contributions paid to CareSuper, complete a **Choice of fund** form.

Complete this form in blue or black pen using BLOCK LETTERS and tick  where applicable.

## BEFORE YOU TRANSFER

You should consider whether this is right for you and check the impact on any insurance arrangements (such as loss of insurance) or other benefits you may have in your other account. You should also understand the fees and costs associated with being a CareSuper member. Remember, differences in fees and investment returns can affect your super balance. To find out more you can contact us or your other fund.



## DID YOU KNOW

You can roll your other funds into CareSuper when you join online. It's easy. Just go to [caresuper.com.au/join](https://caresuper.com.au/join).

## 1. YOUR PERSONAL DETAILS

Member account number \_\_\_\_\_ Date of birth (DD/MM/YYYY) \_\_\_\_\_

Surname \_\_\_\_\_ Title \_\_\_\_\_

Given names \_\_\_\_\_

Other/previous names \_\_\_\_\_

Gender  Male  Female  A gender not listed here

Residential address (required) \_\_\_\_\_

Suburb \_\_\_\_\_ State/territory \_\_\_\_\_ Postcode \_\_\_\_\_

Mobile \_\_\_\_\_ Daytime telephone \_\_\_\_\_

Email \_\_\_\_\_

If you know that the address held by your other account is different to your current residential address, please provide details below.

Postal address \_\_\_\_\_

Suburb \_\_\_\_\_ State/territory \_\_\_\_\_ Postcode \_\_\_\_\_

## 2. TAX FILE NUMBER

My tax file number (TFN) is: \_\_\_\_\_

You're not obliged to provide your TFN to Caresuper. However, if you don't provide it:

- You might pay more tax on your super contributions. Sometimes you may be able to claim this tax back; however, time limits and other rules may apply
- We may not be able to accept contributions for you
- It may be more difficult for you to monitor your account or to locate it if you lose track of it.

CareSuper is authorised to collect your TFN under the *Superannuation Industry (Supervision) Act 1993*. We'll treat it as confidential and only use it for lawful purposes. This includes disclosing it to another superannuation fund when we're arranging a transfer of funds for you. However, you may request in writing that your TFN not be disclosed to any other trustee.

**If you don't provide your TFN, please provide proof of identity with this form.**

## 3. TYPE AND AMOUNT OF TRANSFER

Please specify (✓) the type of transfer you want to make:

- I want to transfer my FULL balance from my other account to my CareSuper account.
- I want to transfer PART of my balance from my other account to my CareSuper account.\*

Approximate amount to be transferred: \$ \_\_\_\_\_

\*Please confirm your other fund allows partial transfers before completing and returning this form.

## 4. FUND DETAILS

### FROM (TRANSFERRING FUND)

\_\_\_\_\_

Fund name

\_\_\_\_\_

Fund address

\_\_\_\_\_

Suburb

\_\_\_\_\_

State/territory

\_\_\_\_\_

Postcode

\_\_\_\_\_

Fund phone number

\_\_\_\_\_

Membership or account number

\_\_\_\_\_

Australian Business Number (ABN)

\_\_\_\_\_

Unique Superannuation Identifier (USI)

### FROM (SELF-MANAGED SUPER FUND)

\_\_\_\_\_

Fund name

\_\_\_\_\_

Australian Business Number (ABN)

\_\_\_\_\_

Electronic service address (ESA)

### TO (RECEIVING FUND)

\_\_\_\_\_

CARESUPER

\_\_\_\_\_

Fund name

\_\_\_\_\_

1300 360 149

\_\_\_\_\_

Fund phone number

\_\_\_\_\_

98 172 275 725

\_\_\_\_\_

Australian Business Number (ABN)

\_\_\_\_\_

CAR0100AU

\_\_\_\_\_

Unique Superannuation Identifier (USI)



### PROOF OF IDENTITY

You may need to provide proof of identification to transfer funds between your super accounts.

You can provide proof of identification by either uploading a photo or scan of the front and back of a current primary identification and a clear photo of you holding your primary ID, or by attaching certified proof of identity documents to this form and posting it to us.

Please visit [caresuper.com.au/certifyingid](https://caresuper.com.au/certifyingid) or call **1300 360 149** for more information.

You can find out more from:

- The Australian Taxation Office (ATO) at [ato.gov.au](https://ato.gov.au)
- The Australian Securities & Investments Commission (ASIC) at [moneysmart.gov.au](https://moneysmart.gov.au)

### NOTE

For every fund you wish to transfer out of you must complete one **Transfer your super** form and supply one set of proof of identity documents, if required.

**IMPORTANT:** If you have multiple account numbers with this fund, you must complete a separate form and provide proof of ID (if required) for each account you wish to transfer.

## 5. AUTHORISATION AND CONFIRMATION OF YOUR REQUEST

By signing this form:

- I declare that I've read and understood this form and all the information I've supplied is true and correct
- I'm aware I may ask my super fund provider for information about any fees or charges that may apply, or any other information about how this transfer may affect my benefits, and have obtained or don't require any further information
- If I'm requesting to transfer my full balance in my other account, I discharge that fund of all further liability in respect of the benefits paid and transferred to my TO fund.
- I request and consent to the transfer of superannuation as described above and authorise the fund of each account to give effect to this transfer.

### PRIVACY

CareSuper collects your personal information to establish and administer your superannuation account. If you choose not to provide your personal information we may not be able to process your request to transfer your super or administer your account.

By completing this form:

- I confirm I've read the CareSuper Privacy Policy at [caresuper.com.au/privacypolicy](https://caresuper.com.au/privacypolicy)
- I understand how CareSuper intends to handle my personal information and my personal information will only be used for the purposes specified
- I consent to the collection and use of my personal information by CareSuper.

If you have any questions about your rights under the privacy legislation, please call us on **1300 360 149**.

- I authorise CareSuper to use or disclose any ID information provided to electronically match identity details against Government records or other identification sources. The identity match process may involve the use of the Australian Government's Document Verification Service and our third-party identity match provider.



Member's signature

Date (DD/MM/YYYY)

Full name



### YOU MUST PRINT AND THEN SIGN THIS FORM

The form won't be valid if you don't sign and date it.

### ONCE YOU'RE DONE

If you're providing photographic proof of identity, upload this completed form and a copy of your photo ID to the 'Contact us' section of your MemberOnline account or at [caresuper.com.au/getintouch](https://caresuper.com.au/getintouch)

OR

If you're providing certified ID, return this completed form and your certified ID, and any supporting documents to:

**CareSuper**  
**Locked Bag 20019**  
**Melbourne VIC 3001**

For more information call **1300 360 149**.