

Transfer of superannuation into legalsuper

Please use **BLOCK letters and black ink** when completing this form. This request will be invalid if unsigned by the member.

Return this completed form to:
 legalsuper
 GPO Box 4952
 Melbourne VIC 3001
 DX145 Melbourne
 Phone: 1800 060 312
 Fax: 1800 614 431
 Email: mail@legalsuper.com.au

This form is to transfer superannuation into **legalsuper**.

- If you are transferring from more than one fund, please complete a separate form for each fund.
- We will write to you and confirm when your transfer has been received by **legalsuper**.
- Please complete all sections of this form. The transfer cannot proceed if all details of the previous fund are not provided. Information regarding your account in the previous fund can be obtained by calling the administrator of your previous fund.
- Your previous fund may charge an exit fee for this transfer. Check with the administrator of the previous fund if you want to clarify what fee will be charged. **legalsuper** does not charge any fee for transferring your superannuation into **legalsuper**.
- Attach a certified copy of your driver's licence or the photo/details page of your passport.

1. Current personal details

legalsuper membership number

Employer name

Mr Mrs Ms Miss Dr Justice

Surname

Given names

Date of birth (dd/mm/yyyy)

Street/Unit no.

Street name

Suburb/Town/City

State Postcode

Telephone (work)

Telephone (home)

Telephone (mobile)

Email

Occupation

Judge Barrister Solicitor/Lawyer
 Management staff Administration/Support staff

Other (please specify)

2. Details of other fund

I request that benefits held in my previous superannuation account (as noted below) be transferred to **legalsuper**.

Name of superannuation fund (from where my super is to be transferred)

Superannuation fund telephone number

Fund's Australian Business Number (ABN)

Name of administrator of previous superannuation fund

Previous fund street address/PO Box number

Suburb/Town/City

State Postcode

Membership number in previous superannuation fund

Approximate value of benefit

\$

Name of employer contributing to the previous superannuation fund

Date left employer (if applicable) (dd/mm/yyyy)

3. Management of personal information

The personal information that you have provided on this form will be used to transfer your nominated benefit to **legalsuper**. **legalsuper** will also use this information to verify that the personal information that it already holds about you is correct. If you do not provide the information, **legalsuper** will not be able to process your request.

By sending **legalsuper** personal information about yourself, you agree that you have read **legalsuper's** *Policy for management of personal information* and understand how **legalsuper** uses and discloses the personal information. To access the Fund's policy and your personal information, or to make an enquiry about any aspect of your Fund membership, please call **legalsuper** on **1800 060 312**, visit **legalsuper's** website at www.legalsuper.com.au or write to **legalsuper** at GPO BOX 4952, Melbourne VIC 3001.

4. Tax File Number (TFN)

We are required to tell you the following details before you provide your tax file number (TFN).

Your TFN is confidential, and you should know the following things before you decide to provide it:

Under the *Superannuation Industry (Supervision) Act 1993*, your superannuation fund is authorised to collect your TFN, which will only be used for lawful purposes.

These purposes may change in the future as a result of legislative change. The trustee of your superannuation fund may disclose your TFN to another superannuation provider, when your benefits are being transferred, unless you request to the trustee of your superannuation fund in writing that your TFN not be disclosed to any other superannuation provider.

It is not an offence not to quote your TFN. However, giving your TFN to your superannuation fund will have the following advantages (which may not otherwise apply):

- your superannuation fund will be able to accept all types of contributions to your account/s;
- the tax on contributions to your superannuation account/s will not increase;
- other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your superannuation benefits; and
- it will make it much easier to trace different superannuation accounts in your name, so that you receive all your superannuation benefits when you retire.

The consequences of not providing your TFN may change in future as a result of legislative changes.

If you do tell us your TFN, we will treat it as confidential and use it for legal purposes, such as:

- to calculate tax on any Eligible Termination Payment you may be entitled to;
- to give your TFN to the relevant authority, if we are paying unclaimed money;
- to give your TFN to the Commissioner of Taxation if you receive a benefit; and
- if we transfer your benefits to another superannuation fund or a retirement savings account.

These purposes may change in future as a result of legislative changes. If you do not want us to do this, you can notify us in writing not to do so.

For more information, please contact your tax advisor or **legalsuper** administration.

My tax file number is

5. Authorisation

- I declare that I have read this form and that the information completed is true and correct.
- I am aware that I may ask my transferring fund and **legalsuper** for information about fees and charges that may apply, or any other information about the effect this transfer may have on my benefits, and do not require any further information.
- I authorise **legalsuper** to make arrangements with the transferring fund nominated above to have my superannuation transferred into my account with **legalsuper** and acknowledge that this authorisation is irrevocable.
- On payment from the transferring fund to **legalsuper**, I discharge the trustee of that fund from any further liability to me in respect of my superannuation benefit.
- I approve the deduction of transfer fees (if applicable) by the transferring fund from the benefit transferred to **legalsuper**.

- I request any contributions received by the transferring fund after payment of my benefit to **legalsuper** be redirected to my account in **legalsuper**.

Member's signature

Date (dd/mm/yyyy)

6. Note for the previous superannuation fund

Compliance

- **legalsuper** has been a complying resident regulated fund since July 1994 under the *Superannuation Industry (Supervision) Act 1993* (SIS). The Trustee confirms that the fund has complied with the SIS provisions since that date and is not subject to any direction under section 63 of SIS.

Superannuation fund number

- 1489 839 46

Superannuation product identification number (SPIN)

- LIS0100AU

Requirements for previous superannuation fund administrator

- All cheques should be made payable to '**legalsuper**' and sent to **legalsuper** at GPO Box 4952, Melbourne VIC 3001.
- Please complete details below and return a copy of this page with payment, unless providing the required details in another format.
- If benefits are unable to be transferred to **legalsuper**, please notify **legalsuper** as soon as possible so that the member can also be informed.

Information to be provided by the previous superannuation fund administrator

Membership number in previous fund

Mr Mrs Ms Miss Dr Justice

Surname

Given names

Total benefit transferred

\$

Tax-free component

\$

Taxable component

\$

Preservation status:

Preserved amounts

\$

Restricted non-preserved amounts

\$

Unrestricted non-preserved amounts

\$

Date of commencement (dd/mm/yyyy)