

Rollover Request

Partial account roll-in to TelstraSuper



Complete this form to transfer part of your super from an external super fund into your TelstraSuper account.

RED SECTIONS FOR YOUR INFORMATION

GREY SECTIONS TO FILL OUT

Save time! Complete in **SuperOnline**

Before you start

- Do not use this form if you wish to roll-in (transfer) your entire benefit from an external super fund. For information about how to consolidate your entire benefit to TelstraSuper visit telstrasuper.com.au/consolidate
- If you have more than one account that you wish to partially transfer to TelstraSuper, you must complete an individual **Rollover request** form for each one (this is a legislative requirement).
- You should consider whether your partial transfer to TelstraSuper will affect your insurance cover (if any) in the external super fund that you are transferring from, including whether it will result in cancellation of your insurance cover in that super fund.
- 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.

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



Before you act

You may wish to consult an adviser before you make any decisions relating to your financial affairs. To speak with an adviser from TelstraSuper Financial Planning call **1300 033 166**.

2. External fund details (complete all fields)

You will find these details on your most recent member statement or contact your external fund.

Roll-in (transfer) \$ _____ into TelstraSuper.

Name of fund _____

Address of fund _____

Member/account no. _____

ABN _____

Unique Superannuation Identifier (USI) _____

TelstraSuper SPIN TLS0100AU ABN 85 502 108 833

3. Declaration and signature

By signing this form, I:

- acknowledge that all the information I have provided on this form is true and correct
- understand that before I transfer funds 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
- 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
- acknowledge that any insurance that I have with the external super fund from which I am making this partial transfer may be affected by this transfer, including being cancelled if I do not have sufficient money remaining in that other fund
- 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
- 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 how this rollover may affect your insurance
- signed and dated the form.



Important Information

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

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

Change of name

After marriage/separation/divorce

Certified copy of one 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.

Other reason:

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

Signing 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 a copy of 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.

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

How to provide your Certified proof of identity documents

You must keep your original ID documents. The certified copy of your proof of identity documents is only valid for 12 months from when the original documents were certified (provided the original ID documents have not expired). We recommend that you upload your certified copy of your proof of identity documents via SuperOnline. Alternatively, you can send via post.