

Transfer other super into the APSS

By completing this form, you will request the transfer/rollover of all or part of the balance of your superannuation benefits in another fund, the FROM fund, to an existing Member Savings account in the APSS.

Where relevant this form will NOT change the fund to which your employer pays your contributions. You must use the Australian Taxation Office's *Standard Choice* form (available from ato.gov.au) to change funds.

Your Details

Gender: Male Female

Name: _____ Date of birth: _____

Address: _____

_____ State: _____ Postcode: _____

Daytime phone: _____ Mobile phone: _____

Email: _____ Tax File Number: _____

Under the Superannuation Industry (Supervision) Act 1993, you are not obliged to disclose your tax file number, but there may be tax consequences. See "What happens if I do not quote my tax file number?" on page 5.

Important

This transfer may close your account in the FROM fund (you will need to check this with your FROM fund). Before transferring your super from another fund into the APSS, it's important to consider the impact of any exit/withdrawal fees imposed by the FROM fund, any changes to (or loss of) insurance cover, or the loss of benefits and investment options in the FROM fund that may result from transferring your super or closing your account. Refer to 'What do you need to consider when transferring your superannuation?' on page 5.

You should also consider seeking professional financial advice tailored to your particular circumstances before making decisions about transferring your super.

This form CANNOT be used to:

- transfer benefits if you don't know where your superannuation is;
- transfer benefits from multiple funds on this form. (A separate form must be completed for each fund you wish to transfer superannuation from);
- change the fund to which your employer pays contributions on your behalf, if relevant;
- open a superannuation account; or
- transfer benefits under certain conditions or circumstances, for example if there is a superannuation agreement under the *Family Law Act 1975* in place.



Transfer other super into the APSS (continued)

Proof of identity

I have attached a certified copy of my driver's licence or passport

OR

I have attached certified copies of:

my Birth/Citizenship Certificate or Centrelink Pension Card **AND** a Government benefits letter or ATO notice (less than 1 year old) or local council / utilities provider notice (less than 3 months old) that includes my name and address.

Important

See *Providing proof of identity* on pages 4 and 5 of this form before completing this section.

If you do not complete all of the fields of this form, there may be a delay in processing your request. If you need help with this form, call SuperPhone on **1300 360 373**.

Instructions for transfer of superannuation

I wish to transfer my superannuation from:

Name of FROM fund: _____

Fund's address: _____

_____ State: _____ Postcode: _____

Fund's phone: _____

Membership or account number: _____

Fund's Australian Business Number (ABN): _____

Fund's Unique Superannuation Identifier (USI) number: _____

Amount to be transferred: Entire balance Amount: \$ _____

To:

Name of fund: **Australia Post Superannuation Scheme** Fund phone number: **1300 360 373**

Member number (This number is shown on your Annual Benefit Statement.

For Australia Post employees, it is the same as your APS number): _____

Australian Business Number (ABN): **42 045 077 895**

Note

If you have multiple account numbers with this fund, you must complete a separate form for each account you wish to transfer.

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Transfer other super into the APSS (continued)

Authorisation

By signing this request form I am making the following statements:

- I declare I have fully read this form and the information completed is true and correct;
- I am aware I may ask my superannuation provider of the FROM fund for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my insurance cover or benefits, and I confirm that I do not require any further information; and
- I discharge the superannuation provider of my FROM fund of all further liability in respect of the benefits paid and transferred to the APSS.
- If the Trustee of the FROM fund holds my tax file number, I understand that this will be passed to the Trustee of the APSS, unless I have requested in writing that the FROM fund not do this.

I request and consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect to this transfer.

Privacy Collection Statement

I acknowledge and understand:

- that my personal information will be collected by the Trustee (PostSuper Pty Ltd) and stored and dealt with in accordance with the Trustee's Privacy Policy, available at apss.com.au, for the purpose of managing and administering my APSS Account;
- that if my personal information is not collected, then the Trustee may not be able to manage and administer my APSS Account;
- that my personal information may be disclosed to the Trustee's service providers, professional advisers, regulatory bodies and my employer (if applicable) and other parties (as required) in the course of managing and administering my account, as required by law or with my consent;
- that my personal information may be shared with overseas organisations and that I can obtain details of the countries in which such organisations are located by reading the Trustee's Privacy Policy; and
- the Trustee's Privacy Policy contains information about how I can access and seek correction of any personal information held about me by the Trustee, how I can complain about a breach of the Privacy Act 1988 (Cth) and how the Trustee will deal with any such complaint.

I consent to the handling of my information in this manner and acknowledge that I can access my personal information by contacting the APSS.

Signature: _____ Date: _____

More information

For more information about superannuation, visit the Australian Securities and Investments Commission website at fido.asic.gov.au or the Australian Taxation Office website at ato.gov.au/super

Checklist

- Have you read the important information?
- Have you considered where your future employer contributions will be paid?
- Have you attached the certified documentation including any linking documents if applicable?
- Have you completed all the fields on the form?
- Have you signed and dated the form?

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Transfer other super into the APSS (continued)

Providing proof of identity

You will need to provide documentation with this transfer request to prove you are the person to whom the superannuation entitlements belong. Your identification documents may be verified by the fund through an electronic website provided by the Australian Government. We may be required to ask for further identification from you in order to meet relevant regulatory requirements.

You must provide:

EITHER

Original or certified copies of **one** of the following documents:

- valid driver's licence issued under State or Territory law that contains a photograph of you
- valid passport issued by the Commonwealth, or similar document issued by a foreign government that contains your photograph and signature (If it is not in English, it must be accompanied by an English translation prepared by an accredited translator)

OR

Original or certified copies of **one** of the following documents:

- birth certificate or extract issued by a State or Territory of Australia or a foreign government (If it is not in English, it must be accompanied by an English translation prepared by an accredited translator)
- citizenship certificate issued by the Commonwealth or a foreign government (if it is not in English, it must be accompanied by an English translation prepared by an accredited translator)
- pension card issued by Centrelink that entitles you to financial benefits

AND

One of the following documents:

- notice issued by Commonwealth, State or Territory government (no older than 12 months) regarding the provision of financial benefits that contains your name and residential address (such as a letter from Centrelink regarding a Government assistance payment)
- notice issued by the Australian Taxation Office (no older than 12 months) that contains your name and residential address and records a tax debt payable to or by you
- notice issued by a local government body or utilities provider (no older than 3 months) that contains your name and residential address and records the provision of services to you.

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

If you have changed your name or you are signing on behalf of another person, you will need to provide a certified linking document. A linking document is a document that proves a relationship exists between two (or more) names or between you and the person you are signing on behalf of.

The following table contains information about suitable linking documents:

Purpose	Suitable linking documents
Change of name	Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office.
Signed on behalf of the applicant	Guardianship papers or Power of Attorney.

Certification of identification and linking documents

All copied pages of original proof of identification documents (including any linking documents) need to be certified as true copies by any individual approved to do so (see the list on page 5).

The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping "certified true copy" followed by their signature, printed name, qualification (e.g. Justice of the Peace, police officer, etc.) and date.

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Transfer other super into the APSS (continued)

Persons who can certify copies of original documents as true and correct copies:

- A person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner
- Australian Consular Officer
- Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1995)
- Bailiff
- Chief executive officer of a Commonwealth court
- Clerk of a court
- Chiropractor
- Commissioner for Affidavits
- Commissioner for Declarations
- Dentist
- Employee of the Australian Trade and Investments Commission who is in a country or place outside Australia, authorised under paragraph 3 (d) of the Consular Fees Act 1955, and exercising his or her function in that place
- Employee of the Commonwealth who is in a country or place outside Australia, authorised under paragraph 3(c) of the Consular Fees Act 1955, and exercising his or her function in that place
- Fellow of the National Tax Accountants' Association
- Finance company officer with two or more years of continuous service
- Holder of a statutory office not specified in another item in this list
- Judge of a court
- Justice of the Peace
- Magistrate
- Master of a court
- Medical practitioner
- Member of Chartered Secretaries Australia
- Member of Engineers Australia, other than at the grade of student
- Member of the Australasian Institute of Mining and Metallurgy
- Member of the Association of Taxation and Management Accountants
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the Institute of Public Accountants
- Member of:
 - the Parliament of the Commonwealth; or
 - the Parliament of a State; or
 - a Territory legislature; or
 - a local government authority of a State or Territory
- Minister of religion registered under Subdivision A of Division 1 of Part IV of the Marriage Act 1961
- Non-commissioned officer of the Australian Defence Force with two or more years of continuous service
- Notary public (including a notary public in a foreign country)
- Nurse
- Officer of a Bank, Building Society or Credit Union, with two or more years of continuous service
- Officer or Warrant Officer of the Australian Defence Force
- Officer with, or authorised representative of, a holder of an Australian financial services licence, having two or more continuous years of service with one or more licensees
- Officer with, or a credit representative of, a holder of an Australian credit licence, having two or more years of continuous service with one or more licensees
- Optometrist
- Patent attorney or trade marks attorney
- Permanent employee of a Commonwealth, State or Territory Government with two or more years of continuous service
- Permanent employee of a Commonwealth authority or a State or Territory authority or a local government authority with two or more years of continuous service
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- Pharmacist
- Physiotherapist
- Police officer
- Psychologist
- Registered marriage celebrant under subdivision C of Division 1 of Part IV of the Marriage Act 1961
- Registrar, or Deputy Registrar, of a court
- Senior executive service employee of the Commonwealth or a Commonwealth authority or a State or Territory, or a State or Territory authority
- Sheriff or Sheriff's officer
- Teacher employed on a full-time basis at a school or tertiary education institution
- Veterinary surgeon

Frequently asked questions

What happens to your future employer contributions?

Using this form to transfer your benefits will not change the fund to which your employer, if relevant, pays your contributions and may close the account you are transferring your benefits FROM.

If you wish to change the fund into which your contributions are being paid, you will need to speak to your employer about Superannuation Choice. For the appropriate forms and information about whether you are eligible to choose the fund to which your employer contributions are made, visit www.ato.gov.au or call the Australian Taxation Office on **13 10 20**.

What do you need to consider when transferring your superannuation?

When you transfer your superannuation, your entitlements under that fund may cease. You need to consider all relevant information before you make a decision to transfer your superannuation.

If you ask for information, your superannuation provider must give it to you. Some of the points you may consider are:

- **Fees** – your FROM fund must give you information about any exit or withdrawal fees. If you are not aware of the fees that may apply, you should contact your fund for further information before completing this form. The fees could include administration fees as well as exit or withdrawal fees. The APSS does not charge entry or contribution fees on transfer. Differences in fees funds charge can have a significant effect on what you will have to retire on. For example, a 1% increase in fees may significantly reduce your final benefit.
- **Death and disability benefits** – your FROM fund may insure you against death, illness or an accident which leaves you unable to return to work. If you choose to leave your current fund, you may lose any insurance entitlements you have. Additional insurance may not be offered when amounts are transferred to the APSS. When considering the APSS, you may wish to check the costs and amount of any cover offered by the FROM fund.

What happens if you do not quote your Tax File Number (TFN)?

You are not obligated to provide your TFN to the APSS. However, if you do not provide your TFN, the APSS may be required to deduct additional tax from your before-tax (concessional) contributions and your benefits when they are paid to you. **The APSS may deduct this additional tax from your account.**

If the APSS does not have your TFN, you will not be able to make after-tax contributions to the APSS. Choosing to quote your TFN will also make it easier to keep track of your superannuation in the future.

Under the *Superannuation Industry (Supervision) Act 1993*, the APSS 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 TFN may be disclosed to another superannuation provider, when your benefits are being transferred, unless you request in writing that your TFN is not to be disclosed to any other superannuation provider.

When will the transfer happen?

Submitting this form gives the APSS the authority to contact your other superannuation fund in order to process the rollover on your behalf. How long it takes to actually transfer your superannuation benefits into the APSS will depend on how quickly the other fund processes the rollover.



Please return the original copy of this form to APSS, Locked Bag A5005, Sydney South, NSW 1235

Note: Faxes cannot be accepted because we must have an original signature.