

PARTIAL ROLLOVER TRANSFER FORM

INSTRUCTIONS

Please use BLOCK LETTERS and BLACK PEN.

Complete this form to transfer part of the balance held in another super fund into **australianethical** Super. You will need to complete a separate form for each benefit you wish to transfer. To transfer the whole balance complete the *Rollover transfer form* available from our product guide (PDS).

To have a new employer make payments into **australianethical** you will need to give your employer your **australianethical** member number and a copy of the *Letter of compliance* available from our product guide or on our website.

SECTION 1 – PERSONAL DETAILS

Title	<input type="text"/>	Surname	<input type="text"/>	DOB	<input type="text"/>
Given name(s)	<input type="text"/>				
Unit/Street number	<input type="text"/>	Gender	<input type="text"/>	TFN	<input type="text"/>
Street name	<input type="text"/>				
Suburb	<input type="text"/>	State	<input type="text"/>	Postcode	<input type="text"/>
Phone	<input type="text"/>	Phone (business hours)	<input type="text"/>		<input type="text"/>
Mobile	<input type="text"/>		Fax	<input type="text"/>	<input type="text"/>
Email	<input type="text"/>				
@	<input type="text"/>				

SECTION 2 – SUPER YOU ARE TRANSFERRING FROM (from fund)

Name of fund	<input type="text"/>				
Member number	<input type="text"/>	Fund Phone	<input type="text"/>		<input type="text"/>

SECTION 3 – SUPER YOU ARE TRANSFERRING TO

Name of fund	<input type="text" value="Australian Ethical Retail Superannuation Fund"/>	ABN	<input type="text" value="4 9 6 3 3 6 6 7 7 4 3"/>
Fund Phone	<input type="text" value="1 3 0 0 1 3 4 3 3 7"/>	Super Product Identification Number (SPIN)	<input type="text" value="A E T 0 1 0 0 A U"/>

SECTION 4 – TRANSFER AMOUNT

A partial transfer of \$

SECTION 5 – PROOF OF IDENTITY

You need to provide identification documentation with this transfer request to prove you are the person to whom the super entitlements belong.

Select the documents you wish to supply:

- | | | | | |
|---|-----------|---|------------|--|
| <input type="checkbox"/> I have attached a certified copy of my driver's license or passport. | OR | <input type="checkbox"/> I have attached certified copies of both: Birth/Citizenship Certificate or Centrelink Pension Card | AND | <input type="checkbox"/> Centrelink payment letter or government or local council notice (less than 1 year old) with your name and address |
|---|-----------|---|------------|--|

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. 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 (for example Justice of the Peace, Australia Post employee) and date.

