

## INSTRUCTIONS

Please use BLOCK LETTERS and BLACK PEN.

Complete this form to transfer all of the balance held in another super fund into Australian Ethical Super. This transfer may close your account with that super fund. You will need to check this with that fund.

### SECTION 1 – PERSONAL DETAILS

Title	Surname				
Given names					
Unit	Street number				
Street					
Suburb	State		Postcode		
Gender	Date of birth	TFN			
Mobile	Work phone				
Home phone					
Email					

### SECTION 2 – SUPER YOU ARE TRANSFERRING FROM

Name of fund				
	(This is the only mandatory field in this section)			
Member number	Fund phone			
Super Product Identification Number (SPIN)	ABN			

If you have other super accounts you will need to complete a separate form for each of the other funds and provide proof of identity for each one. This form is also available on our website – [www.australianethical.com.au/forms-individual](http://www.australianethical.com.au/forms-individual).

### SECTION 3 – SELECTING YOUR SUPER OPTIONS

Name of fund	Australian Ethical Retail Superannuation Fund			
<b>Member number</b>	Fund phone	1300 134 337		
Super Product Identification Number (SPIN)	ABN	49 633 667 743		

In the unlikely event that we cannot accept your transfer, we will advise you.

**SECTION 4 – PROOF OF IDENTITY**

You need to provide certified 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.	<b>OR</b>	<input type="checkbox"/> I have attached certified copies of both birth/citizenship certificate or Centrelink pension card	<b>AND</b>	<input type="checkbox"/> Centrelink payment letter or government/local council notice (less than 1 year old) with your name and address
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**CERTIFICATION OF PERSONAL 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 below). 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 (eg Justice of the Peace, Australia Post employee) and date.

**PEOPLE WHO CAN CERTIFY YOUR IDENTIFICATION**

- a permanent employee of Australia Post with five or more years of continuous service
- a pharmacist
- a finance company (bank) officer with five or more years of continuous service (with one or more finance companies)
- a chartered accountant who is a member of the Institute of Chartered Accountants in Australia, CPA Australia or the National Institute of Accountants with two or more years continuous membership
- an officer with, or authorised representative of, a licenced financial adviser
- a Justice of the Peace.

**THINGS TO CONSIDER WHEN TRANSFERRING YOUR SUPER**

When you transfer your super, your entitlements under that fund may cease. You need to consider all relevant information before you make a decision to transfer your super. If you ask for information, your super 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. Your TO fund may also charge entry or deposit 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 per cent 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. Other funds may not offer insurance, or may require you to pass a medical examination before they cover you. When considering a new fund, you may wish to check the costs and amount of any cover offered.

**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 the applicant, 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.

Suitable linking documents for the following purposes:

- change of name – marriage certificate, deed poll or change of name certificated from the births, deaths and marriages registration office
- signed on behalf of the applicant – guardianship papers or power of attorney.

**INSTRUCTION TO YOUR EXISTING FUND (THE FROM FUND)**

I/we hereby request that you transfer the value of the FROM super fund to the Australian Ethical Retail Superannuation Fund, a complying superannuation fund. Please provide all information to the trustee, Australian Ethical Superannuation Pty Ltd (ABN 43 079 259 733) and forward payments to: Australian Ethical Superannuation PO Box 1916 Wollongong NSW 2500.

**SECTION 5 – AUTHORISATION**

By signing this section of the form I am making the following statements:

- I declare that I have fully read this form and the information completed is true and correct.
- I am aware I may ask my superannuation provider 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 do not require any further information.

- I discharge the superannuation provider of my FROM 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 superannuation provider of each fund to give effect to the transfer.

Signature _____	Date _____
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