

When completing this form

- Please print in black or blue pen, in UPPERCASE.

After completing this form

Sign the authorisation.

Post: PO Box 832, Newcastle NSW 2300

Email: admin@reisuper.com.au

Important information



This request may close the account you're transferring your benefit from.

Things you need to consider when transferring your super

- Consider all relevant information. Differences in fees and investment returns can affect your super balance at retirement
- Check if you have insurance with your other fund, as this will cease if your account is closed. You may be eligible to transfer your cover, contact us for more information
- Consider if you want to claim a tax deduction or split contributions, as you won't be able to do this on the contributions you've transferred
- Let your employer know that you've changed super funds. All future contributions should then be paid to REI Super.

What happens if you do not quote my tax file number (TFN)?

You are not required to provide your TFN to your super fund. However, if you do not provide your TFN, you may be taxed at the highest marginal tax rate, plus the Medicare levy, on contributions made to your account in the year, compared to the concessional tax rate of 15%.

If we don't have your TFN, you will not be able to make personal contributions to your super account. Choosing to quote your TFN will also make it easier to keep track of your super in the future.

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

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

You will need to provide a copy of your identification documents (driver's licence or passport). We will verify your identity electronically. If we cannot verify your identity electronically, we may ask for certified copies of your identification documents. See How to prove your identity guide under Publications and forms on reisuper.com.au. If you have changed your name or are signing on behalf of the applicant, you will need to provide a linking document – a linking document is a document that proves a relationship exists between two (or more) names. 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*

***Power of Attorney document must be a certified copy if not the original.**

Where do I send the form and my ID?

Once you have completed and signed this form, please either:

Post: PO Box 832, Newcastle NSW 2300

Email: admin@reisuper.com.au

Combine your Super Form



ROLLOVER INITIATION REQUEST TO TRANSFER YOUR SUPERANNUATION BENEFITS BETWEEN FUNDS.

COMPLETING THIS FORM

- Read the important information pages
- Please print in black or blue pen, in UPPERCASE.

AFTER COMPLETING THIS FORM

- Sign the authorisation
- Send form to either your **FROM** (transferring) or **TO** (receiving) fund.

Your Privacy

The Fund is administered by us along with our service provider, SS&C Bluedoor Pty Limited (SS&C). We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information about the other products and services offered by us and our related companies.

If you do not wish to receive marketing material, please contact us on **1300 13 44 33**.

Our Privacy Policies are available to view at reisuper.com.au/privacy-policy or you can obtain a copy by contacting us on **1300 13 44 33**.

If you do not provide the personal information requested, we may not be able to manage your superannuation.

We may sometimes collect information about you from third parties such as your employer, a previous super fund, your financial adviser, our related entities and publicly available sources.

We may disclose your information to various organisations in order to manage your super, including your employer, our professional advisers, insurers, our related companies which provide services or products relevant to the provision of your super, any relevant government authority that requires your personal information to be disclosed, and our other service providers used to assist with managing your super.

In managing your super your personal information will be disclosed to service providers in another country, most likely to SS&C's processing centre in India. Our Privacy Policies list all other relevant offshore locations.

Our Privacy Policies set out in more detail how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact us on **1300 13 44 33** or write to our Privacy Officer, PO Box 832, Newcastle NSW 2300.

▶ PART 1: Your details

☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Dr ☐ Other		Member number	
Given names			
Surname		Date of Birth (DD-MM-YYYY)	
Residential address			
Suburb		State	Postcode
Postal address. If the same as your residential address, mark X in this box.			
Suburb		State	Postcode
Mobile phone	Home phone		
Email			

Combine your Super Form cont...

> PART 2: FUND DETAILS

FROM (Transferring fund)

*Fund name

*Fund address

Fund phone number

*Membership or account number

Australian Business Number (ABN)

Unique Superannuation identifier



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

Your REI Super account (the account transferring into)

*Fund name

*Fund address

PO Box 832, Newcastle NSW 2300

Fund phone number

*Membership or account number

Australian Business Number (ABN)

Unique Superannuation Identifier

> PART 3: AMOUNT

Transfer Amount

☐

Total balance transfer

☐

Partial balance transfer of \$

> PART 4: 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 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 have obtained or do not require such information.
 - I consent to my tax file number being disclosed for the purposes of consolidating my account.
 - I discharge the trustee of my previous super fund of all further liability in respect
- of the benefits paid and transferred to REI Super.
 - 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.
 - I agree to REI Super using the information and document details provided above to verify my identity electronically using independent data sources via a third party.

*Denotes mandatory field. If you do not complete all of the mandatory fields, there may be a delay in processing your request.

*Name (PRINT IN BLOCK LETTERS)

*Signature

*Date DD/MM/YYYY

> READY TO SEND US YOUR FORM?

Once you have completed and signed this form, please either:

Post: REI Super, PO Box 832, Newcastle NSW 2300

Email: admin@reisuper.com.au

> WE'RE HERE TO HELP

If you need any assistance with filling out this form, or have any questions about super, please feel free to call us on **1300 13 44 33**.