



# FuturePlus Super

## Transfer-in Authority (from an external fund)

### Please complete in capital letters and in BLACK INK only

FuturePlus Super is a regulated superannuation fund under Superannuation Law and is able to accept transfers of all superannuation benefits, whether preserved or non-preserved, from any complying fund.

This form is to be completed if you would like to transfer monies to your FuturePlus Super account.

Before completing this form you should read the Important Notes at the back of this form.

Upon receipt of this form, we will forward it to your previous super fund – as per the authorisation supplied by you in Section 5. "Member declaration".

### 1. Your details

Member No	<input type="text"/>	Date of birth (dd/mm/yyyy)	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>
Title	<input type="text"/> (e.g. Mr/Mrs/Ms/Miss/Dr)						
Family name	<input type="text"/>						
Given name(s)	<input type="text"/>						
Tax file number	<input type="text"/>	<input type="text"/>	<input type="text"/>	Under the <i>Superannuation Industry (Supervision) Act 1993</i> , 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 (See "What happens if I do not quote my tax file number?")			
<b>Contact Details (postal address, telephone, email)</b>							
No./Street/PO Box	<input type="text"/>						
Suburb/Town/City	<input type="text"/>						
State/Territory	<input type="text"/>	Postcode	<input type="text"/>	Country (if outside Australia)	<input type="text"/>		
Phone: Home no. (inc. STD/ISD)	<input type="text"/>			Business no. (inc. STD/ISD)	<input type="text"/>		
Mobile no.	<input type="text"/>			Fax no. (inc. STD/ISD)	<input type="text"/>		
E-mail address	<input type="text"/>						
<b>Residential Address</b>							
<input type="checkbox"/>	<b>Same as Postal Address above</b>						
<input type="checkbox"/>	<b>Different from Postal Address above – you MUST complete below</b>						
No./Street	<input type="text"/>						
Suburb/Town/City	<input type="text"/>						
State/Territory	<input type="text"/>	Postcode	<input type="text"/>	Country (if outside Australia)	<input type="text"/>		



## 2. FROM fund details

Please provide the following information. You may need to contact your previous fund or check your last fund statement.

Fund name		
Address of the Fund Administrator or Trustee		
Membership/ Account no.		ABN no.
Phone no. (inc. STD/ISD)		SPIN no.

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

## 3. TO fund details

Please make cheque payable to "FuturePlus Super".

Fund Name	FuturePlus Super
Superannuation Product Identification Number (SPIN):	CFS 0102 AU
Superannuation Fund Number (SFN):	2997 359 40
Australian Business Number (ABN):	76 829 356 693
Registered Superannuation Entity Number:	R1004366
RSE Licence Number:	L0001120

## 4. Proof of identity and date of birth (see 'What is Required for Proof of Identity and Date of Birth')

I have attached a **certified** copy of proof of identity and date of birth documentation (eg my unexpired driver's licence or my passport provided it is current or has expired no more than 2 years ago) as per 'What is Required for Proof of Identity and Date of Birth'.

**For information on the acceptable documents to prove your identity and your date of birth, who can certify such documents (eg Justice of the Peace, solicitor), where you have changed your name and/or are signing on behalf of another person, see information sheet titled 'What is Required for Proof of Identity and Date of Birth' on our website (see address on Page 3) or call Member Services on the telephone number on Page 3.**

## 5. Member declaration

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

- I declare that I have fully read this form and that the information completed on this form is true and correct.
- I am aware that I may ask my old 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 further information.
- I understand and acknowledge the implications of transferring my benefits from my previous fund to FuturePlus Super.
- I request and authorise the transfer to FuturePlus Super of any subsequent contributions which may be received after benefits have been transferred to FuturePlus Super.
- I authorise the Trustee of FuturePlus Super to make all necessary arrangements, including completing any necessary documentation to effect this transfer.
- I consent to representatives of Chifley Financial Services Pty Limited (Australian Financial Services Licence No. AFSL 231148) to obtain any information in relation to my superannuation.
- I authorise my previous fund to provide the Trustee of FuturePlus Super with all relevant details, including details of my membership, a copy of the Rollover Benefit Statement and any other information which may be required to effect this transfer. By giving this authorisation to transfer my benefits:
  - 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 understand that the previous fund Trustee may be entitled to deduct transfer or exit fees from the benefits transferred; and
  - I understand that FuturePlus Super does not levy any transfer fees when receiving rollovers from other superannuation funds.
- 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.

Print Name			
Signed		Date (dd/mm/yyyy)	/ /



## IMPORTANT NOTES

You should read the Product Disclosure Statement (PDS) before completing this form. The PDS is available from Member Services and the Fund's website.

### CHECKLIST

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

### WHAT HAPPENS TO MY FUTURE EMPLOYER CONTRIBUTIONS

Using this form to transfer your benefits will not change the fund to which your employer 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 Choice. For more information about whether you are eligible to choose the fund to which your employer contributions are made, call Member Services. Alternatively you may care to contact the Australian Taxation Office on 13 10 20. Please note that you must be currently employed by a FuturePlus Super employer to contribute or transfer money into your account.

### THINGS 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. Your superannuation provider is required to provide you with any information that you may request. When transferring a benefit, some of the things that you need to consider are:

- **Fees** – your **FROM** fund is required to 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.
- **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 in that fund. Before transferring to the Fund, you may wish to enquire about the cost and amount of cover offered.

### WHAT HAPPENS IF I DO NOT QUOTE MY TAX FILE NUMBER (TFN)?

You are not obliged to provide your TFN to the Fund. However, if you do not provide your TFN, your account 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%. The Fund will deduct this additional tax from your account.

If the Fund does not have your TFN, you will not be able to make personal contributions to your superannuation account. 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, your superannuation fund 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 a 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 Trustee.

### PROTECTING YOUR PRIVACY

Some of the personal information you are requested to provide is required to establish and maintain your membership in FuturePlus Super while other information is required under Australia's Anti-Money Laundering and Counter-Terrorism Financing laws.

The Trustee is fully committed to comply with the National Privacy Principles in the way in which your personal information is stored and used. Full details of how this is achieved are contained in the Trustee's Privacy Policy, which is available from Member Services or the website at [www.futureplussuper.com.au](http://www.futureplussuper.com.au).

### TRUSTEE INFORMATION

Please note that the information contained in this document is of a general nature only and does not constitute personal advice as it does not take into account your personal objectives, financial situation or needs. Any advice in this document is provided by Chifley Financial Services Limited (ABN 75 053 704 706), as an Australian Financial Services Licensee (AFSL 231148). Chifley Financial Services Limited is an APRA Registrable Superannuation Entity Licensee and the trustee of FuturePlus Super (ABN 76 829 356 693). Chifley Financial Services Limited is co-owned by Energy Industries Superannuation Scheme Pty Limited (ABN 72 077 947 285), Unions NSW, Australian Workers Union (ABN 28 853 022 982 trading as the Australian Workers Union National Office) and the Australian Workers Union (ABN 70 662 384 762 trading as The Australian Workers Union Greater New South Wales Branch).

You should not rely solely on this information and you should consider your own personal objectives, financial situation and needs before acting on this information. Prior to making any investment decision you should obtain and consider the relevant Product Disclosure Statement (PDS) or other offer document and seek professional investment advice.

### What to do next

Please send this form and certified proof of identity documents to the Fund address below. We will contact your previous fund on your behalf.

**DO NOT FAX OR EMAIL THIS FORM AS YOUR ORIGINAL AUTHORISATION IS REQUIRED**

### Where to send this form/enquiries

FuturePlus Super  
PO Box N835  
Grosvenor Place NSW 1220  
website: [www.futureplussuper.com.au](http://www.futureplussuper.com.au)

Phone: 1800 067 059  
(8.30 am – 5.00 pm Mon – Fri)  
enquiries: [info@futureplussuper.com.au](mailto:info@futureplussuper.com.au)

**Note: We will forward this form to your previous super fund**

