

MyLife MyPension

Request to Consolidate Your Super

Roll other super money into MyLife MyPension

Just fill in this form and send it back to MyLife MyPension. It's that simple. We will contact your other fund managers and look after all the transfer details. There is no charge for this service. If you have more than one fund you want to transfer, you can photocopy this form. Your transfer will be processed faster if you attach a copy of a recent Member Statement from your old super fund. Check the back of this form for more helpful notes about transferring.

If you need help

For assistance call the MyLife MyPension Service Centre on **1300 963 720**.

Step 1 – Complete your personal details Please print in black or blue pen, in uppercase, one character per box. A ✓

Title	Mr <input type="radio"/>	Mrs <input type="radio"/>	Ms <input type="radio"/>	Miss <input type="radio"/>	Other <input type="text"/>	Date of birth	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Given names														
<input type="text"/>														
Surname														
<input type="text"/>														
Member number														
<input type="text"/>														
Residential address														
<input type="text"/>														
Suburb										State		Postcode		
<input type="text"/>										<input type="text"/>		<input type="text"/>		
Postal address (if different from above)														
<input type="text"/>														
Suburb										State		Postcode		
<input type="text"/>										<input type="text"/>		<input type="text"/>		
Daytime Telephone						Mobile								
<input type="text"/>						<input type="text"/>								

Togethr Trustees Pty Ltd (ABN 64 006 964 049; AFSL 246383) is the trustee of Equipsuper Superannuation Fund (ABN 33 813 823 017) ("the Fund"). MyLife MyPension is a division of the Fund.



Step 2 – Provide details of your previous super fund

Name of previous fund or policy

Telephone

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Membership or policy number

Previous fund's Unique Superannuation Identifier (USI) for complying super funds OR

Electronic Service Address (ESA) for SMSFs*

Name of old employer who contributed to the previous fund

Date ceased employment with this employer

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Approximate value of total benefit

\$, ,

I am transferring () :

Full amount Partial amount

* If you are unsure of your previous fund's Unique Superannuation Identifier or ESA, you will need to contact your previous fund.

Step 3 – How do you want to prove your identity?

To protect your super, you need to prove your identity when you move money between super funds.

Choose () one of the two options below:

Use my Tax File Number (TFN)

By choosing this option, you are authorising us to pass your TFN to your other super fund who will use it to confirm your identity with the Australian Taxation Office (ATO). Your TFN is confidential and you don't have to give it to MyLife MyPension, however you may pay more tax than you have to if we don't have it and you will need to provide certified proof of identity documents to transfer super between funds. For more information about providing your TFN, please see your Product Disclosure Statement (PDS).

Enter your TFN here

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Please note: We will validate your TFN and personal details with the Australian Tax Office. If we cannot confirm an exact match with the ATO's records, you will be required to provide full Proof of Identity (see below) and your payout will be delayed.

I have attached certified proof of identity documents. For full details on completing proof of identity, refer to the *Proof of Identity* fact sheet on the fund's website at mylifemypension.com.au or call the MyLife MyPension Service Centre on **1300 963 720**.



Your Privacy

The Fund is administered by us along with our service provider, Mercer Outsourcing (Australia) Pty Ltd. 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 963 720**.

Our Privacy Policies are available to view at mylifemypension.com.au/privacy or you can obtain a copy by contacting us on **1300 963 720**.

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 advisors, 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 Mercer'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 963 720** or write to the MyLife MyPension Privacy Officer, GPO BOX 4303, Melbourne, VIC 3001.

Step 4 – Sign the form

I request that you transfer the total value held in respect of me for the above super fund or policy to MyLife MyPension:

- I understand that on payment by my previous super fund, I discharge that super fund from any further liability in respect of the amount transferred
- I request that any further contributions received by my previous super fund after my payment, be redirected to my membership with MyLife MyPension.
- I understand that I will receive confirmation once my money has been received in MyLife MyPension.
- I understand that I have the right to ask my previous super fund for information that I reasonably require for the purpose of understanding any super entitlements I may have in that fund, including information about any fees and charges that may apply to the transfer and information about the effect of the transfer on any entitlements I have in my previous super fund. I confirm that I do not require such information from my previous fund.
- I understand and consent to my information being collected, disclosed and used in the manner set out in this form.

Signature

Date

/ /



Notes

Please ensure that all details on the front of this form are completed.

Your old fund may charge an exit fee and/or set a buy/sell margin which would mean a reduction in the amount transferred. Please check with the administrator of your old fund for details of any fees. No entry fee will be charged by MyLife MyPension on receipt of this benefit. Also, some super funds have a waiting period. They are commonly 30, 60 or 90 days, and in certain circumstances, up to 6 or 9 months. If there is a delay in processing your transfer, it may be that a waiting period applies at your old fund.

Do not complete this form if you:

- Are still working for your old employer on a casual basis and expect that employer to pay further contributions on your behalf into your old fund; or
- Have advised the Australian Taxation Office to pay an amount from the Superannuation Holding Accounts Reserve (SHAR) to your old fund; or
- Have taken an option under your old fund to continue your insurance cover for a specific period, which has not yet expired; or
- Are not comfortable with, or sure of the exit charges that apply from your old fund.

Transfers are simple... here's what you do

Step 1

Find out where your old super is. You'll need the name of your old fund and your membership number. Start by gathering the most recent statements of all your super funds. If you can't find them, call your old employer(s). They'll be able to tell you which fund your super was paid to and provide a contact number for you **OR** you can contact the Lost Members Register at the **Australian Tax Office** on telephone **131 020** which has a register of lost superannuation money.

Step 2

Fill in the form overleaf. You'll need one for each fund, so you can make copies of this form or call the MyLife MyPension Service Centre on **1300 963 720** for more forms. Your transfer will be processed faster if you attach a copy of your last statement from your old fund(s).

Step 3

Attach proof of identity (certified where required)

Step 4

Send your completed form(s) and proof of identity to **MyLife MyPension**. Once we have received it we will contact your old fund and arrange for your money to be deposited into your MyLife MyPension account.

Step 5

Once your transfer-in has been deposited to your account, we will send you confirmation that your money has been deposited. Your old fund should also send you confirmation that they have closed your account and transferred your money to your MyLife MyPension account. While MyLife MyPension endeavours to complete your transfer quickly, delays may be experienced due to administration processing times of your old fund.

Requirements for the old fund administrator

Being Super stream Compliant, payments are done via EFT.

Please return your completed form to MyLife MyPension, GPO Box 4303, Melbourne, VIC 3001.

