



Consolidate my Super

REQUEST TO TRANSFER WHOLE BALANCE OF SUPERANNUATION BENEFITS FORM

– PERSONAL SUPER AND ROLLOVER PLAN

– SUPERSELECT

Use this form to consolidate your super accounts. USE BLACK OR BLUE PEN AND CAPITAL LETTERS.
You should contact your other super fund to find out if there are any fees, charges or other consequences for transferring your super out of that fund. We also recommend you to speak to a financial adviser or tax adviser before making a decision to transfer your benefit. If you would like more information about your benefit, simply call us on **13 2015** between 8.30am and 6pm (AEST/AEDT) Monday to Friday. * **These fields are mandatory.**

Section 1 – Personal details

Title	*Family name	*Given name(s)	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Other names known by (if any)/Previous names		*Date of birth	*Gender
<input type="text"/>		<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="checkbox"/> Male <input type="checkbox"/> Female
*Residential address (PO Box is not acceptable)			
<input type="text"/>		State	Postcode
If you know that the address held by your From fund is different to your current residential address, please give details below.			
Previous address			
<input type="text"/>		State	Postcode
Telephone number	Tax file number#	# Under the Superannuation Industry (Supervision) Act 1993, you are not obliged to disclose your tax file number, but there may be tax consequences.	
<input type="text"/> (<input type="text"/>)	<input type="text"/>		
Email address	<input type="text"/>		

Section 2 – Fund details

From - Your other Super Fund's details:

*Fund name		
<input type="text"/>		
*Membership or Account number	*Australian business number (ABN)	*Unique Superannuation Identifier (USI)
<input type="text"/>	<input type="text"/>	<input type="text"/>

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

To - Your AIA Australia Super Fund's details:

Fund name (please tick (✓) appropriate)		
Super Retirement Fund – <input type="checkbox"/> Personal Superannuation and Rollover Plan		
– <input type="checkbox"/> SuperSelect		
Fund address	Fund telephone number	
<input type="text"/> Locked Bag 5075 Parramatta NSW 2124	<input type="text"/> 13 2015	
Membership or account number	Fund ABN	Unique Superannuation Identifier (USI)
<input type="text"/>	<input type="text"/> 40 328 908 469	<input type="text"/>
– Personal Super & Rollover Plan		40328908469101
– SuperSelect		40328908469102

Where applicable make cheques payable to 'AIA Australia Limited'

Section 3 – 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 the Trustee/superannuation provider of my new fund for information about fees or charges that may apply, or any other information about the effect this payment/rollover may have on my benefits, and I have obtained or do not require any further information.
- I consent to my tax file number being disclosed for the purposes of consolidating my account.
- 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 this transfer.

Disclosure authorisation

We are here to help you consolidate your super. To provide this service, we may need to contact the fund which you are transferring from, on your behalf. By completing this section you authorise us to follow up your transfer request on your behalf. The Trustee and AIA Australia is sensitive to privacy issues and we treat all personal information we receive with the utmost care. For further information on how we manage information, please refer to our Privacy Policy which can be obtained from our website aia.com.au/privacy or by calling us on 13 2015.

*I, (Full name in **block** letters)

of the above mentioned address hereby authorise full disclosure of my account information to AIA Australia.

Upon production of this document, a photocopy, or facsimile, I authorise you to:

- answer any correspondence from AIA Australia to the extent necessary to give effect to the proposed transfer.
- provide any information as requested by AIA Australia via phone, facsimile or email relating to my accounts held with you.

*Signature

*Date signed

In confidence

Section 4 – Proof of identity

No identification is required for rollovers where your TFN is validated via the ATO SuperTic service. If your TFN cannot be validated, no identification will be required, so long as your name, date of birth and address details provided on your request corresponds with the other funds and our records. If there is a discrepancy in your name, date of birth or address, we, or the other fund, may request that you provide further proof of your identity.

A note to super funds: This form complies with *Regulation 6.33 of the Superannuation Industry (Supervision) regulations 1994* and captures all mandatory information as outlined in the form in Schedule 2A.