

For assistance & enquiries: Ph 132 467  
Please send this completed form to: Intrust Super, GPO Box 1416, Brisbane QLD 4001

Please write in BLOCK letters and use a BLUE or BLACK pen. This request will be invalid if unsigned or undated.

## MEMBER DETAILS (Please complete in full)

Member Number

(This can be found on your Member Statement)

Mr/Mrs/Ms/Miss

Surname

Given Names

Other/previous names

Date of Birth (ddmmyyyy)

Gender

M

F

Code

**Z13**

### Street Address

Street Number

Street Name

Suburb

State

Postcode

### Postal Address (if different)

Street Number / PO Box

Street Name

Suburb

State

Postcode

### Previous Address

If you know that the address held by your previous fund is different from your current residential address please give details below.

Street Number

Street Name

Suburb

State

Postcode

Telephone (daytime)

Mobile

Email (Please note: If you provide your email, some types of correspondence will only be sent to you via email)

## TAX FILE NUMBER (TFN) DETAILS

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 legislative change.

The trustee of Intrust Super may disclose your TFN to another superannuation provider when your benefits are being transferred, unless you request the trustee of Intrust Super in writing that your TFN not be disclosed to any other superannuation provider.

It is not an offence not to quote your TFN. However, giving your TFN to Intrust Super will have the following advantages (which may not otherwise apply):

- Intrust Super will be able to accept all types of contributions to your account/s;
- the tax on contributions to your superannuation account/s will not increase;
- other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your superannuation benefits; and
- it will make it much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

### Tax File Number (TFN) details

Complete this section for all benefit payments

I agree to provide my Tax File Number  No  Yes – my TFN is:

## PREVIOUS FUND DETAILS (If you have a hard copy of your latest statement, please attach a copy)

Please tick one box only

I would like Intrust Super to arrange the transfer of my **WHOLE** benefit from my old fund **OR**

I would like Intrust Super to transfer **PART** of my benefit from my old fund

Amount to be transferred \$

Name of previous fund

Superannuation Product Identification Number (SPIN)\*

ABN\*

\* Obtainable from your previous fund

\* Obtainable from your previous fund

### Address of previous fund

Street Number / PO Box

Street Name

Suburb

State

Postcode

Previous fund membership number

Previous fund phone number

Name of Last or Current Employer to Contribute to this account

I am transferring and closing this account because I am/have:

Ceased Employment with

on Date (ddmmyyy)

**OR**  exercising choice

## Completing Proof of Identity

Please attach **certified documentation** to prove you are the person to whom the superannuation entitlements belong.

Please tick the box/es to show which documents you have attached to this form.

(Only provide original documents if you are submitting this form in person at a Fund office).

EITHER:	OR	AND
<p>One of the following documents only:</p> <p><input type="checkbox"/> A current driver's licence or permit issued under the law of a State or Territory; or</p> <p><input type="checkbox"/> A passport issued by the Commonwealth which can be up to two years out of date; that contains a photograph of the person in whose name the document is issued.</p>	<p>One of the following documents:</p> <p><input type="checkbox"/> birth certificate or birth extract</p> <p><input type="checkbox"/> citizenship certificate issued by the Commonwealth</p> <p><input type="checkbox"/> pension card issued by Centrelink that entitles you to financial benefits.</p>	<p><input type="checkbox"/> letter from Centrelink regarding a Government assistance payment</p> <p><input type="checkbox"/> notice issued by Commonwealth, State or Territory Government within the past 12 months, containing your name and residential address For example: - Tax Office Notice of Assessment - Rates notice from local council</p>

If you are unable to provide accepted certified documents, please contact Intrust Super for other options.

### 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, etc) and date. The following people can certify copies of the originals as true and correct copies:

- Justice of the Peace
- Police officer
- Holder of a statutory office not specified in another item in this list:
- Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the *Marriage Act 1961*
- Minister of religion registered under Subdivision A of Division 1 of Part IV of the *Marriage Act 1961*
- Teacher employed on a full-time basis at a school or tertiary education institution

### AUSTRALIA POST

- Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- Permanent employee of the Australian Postal Corporation with 2 or more years of continuous service who is employed in an office supplying postal services to the public

### LEGAL

- Chief executive officer of a Commonwealth court
- Judge of a court
- Magistrate
- Notary public
- Person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner (however described)
- Registrar or deputy registrar of a court
- Bailiff
- Clerk of a court
- Commissioner for Affidavits
- Commissioner for Declarations
- Legal practitioner
- Master of a court
- Patent attorney
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- Sheriff
- Sheriff's officer
- Trade marks attorney

### MEDICAL

- Chiropractor
- Dentist
- Medical practitioner
- Nurse
- Optometrist
- Pharmacist
- Physiotherapist
- Psychologist
- Veterinary surgeon

### EMPLOYMENT - FINANCE

- Officer with, or authorised representative of, a holder of an Australian financial services licence, having 2 or more continuous years of service with one or more licensees
- Bank officer
- Building society officer
- Credit union officer
- Finance company officer with 2 or more years of continuous service

### EMPLOYMENT - GOVERNMENT

- Australian consular officer or an Australian diplomatic officer (within the meaning of the *Consular Fees Act 1955*)
- Employee of the Australian Trade Commission who is:
  - in a country or place outside Australia; and
  - authorised under paragraph 3 (d) of the *Consular Fees Act 1955*; and
  - exercising his or her function in that place
- Employee of the Commonwealth who is:
  - in a country or place outside Australia; and
  - authorised under paragraph 3 (c) of the *Consular Fees Act 1955*; and
  - exercising his or her function in that place
- Member of the Australian Defence Force who is:
  - an officer; or
  - a non-commissioned officer within the meaning of the *Defence Force Discipline Act 1982* with 2 or more years of continuous service; or
  - a warrant officer within the meaning of that Act

### Member of:

- the Parliament of the Commonwealth; or
- the Parliament of a State; or
- a Territory legislature; or
- a local government authority of a State or Territory

### Permanent employee of:

- the Commonwealth or a Commonwealth authority; or
- a State or Territory or a State or Territory authority; or
- a local government authority;

with 2 or more years of continuous service who is not specified elsewhere in this list

### Senior Executive Service employee of:

- the Commonwealth or a Commonwealth authority; or
- a State or Territory or a State or Territory authority

### PROFESSIONAL AFFILIATIONS

#### Member of:

- Institute of Chartered Accountants in Australia
- National Institute of Accountants
- Australian Society of Certified Practising Accountants

#### Member of:

- Association of Taxation and Management Accountants
- Australasian Institute of Mining and Metallurgy
- Chartered Secretaries Australia
- Engineers Australia, other than at the grade of student

#### Fellow of:

- National Tax Accountants' Association

Please turnover to complete and sign this form ➤

## Completing Proof of Identity: EXAMPLE - Driver's Licence

DRIVER'S LICENCE

Certified True Copy  
S. Sample

0123456789

Mr. Sam Sample  
Justice of the Peace  
00 1234 5678  
1st July 2008

- Copy of the Driver's Licence of the individual wishing to transfer the superannuation entitlement

- Certification and signature of authorised person

- Authorised person's stamp and registration number (if applicable)

- Name of authorised person
- Qualification of authorised person
- Phone number of authorised person
- Date of authorisation

The person who is authorised to certify documents must sight the original and the copy to 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, etc) and date.

## Acknowledgement and signature

### Privacy

When your personal details are provided to Intrust Super they are securely stored and are accessible only to authorised personnel for the purposes of maintaining your account, including your death and disablement insurance arrangements. If you wish to view our privacy statement please go to [www.intrust.com.au](http://www.intrust.com.au).

### Authorisation

- I authorise Intrust Super to make arrangements with the fund nominated on page 1 of this form to have my benefits rolled over to Intrust Super and acknowledge that this notice is irrevocable.
- I discharge the Trustee of my previous superannuation fund from any further liability in respect of any amount once the benefits have been rolled over to Intrust Super.
- I approve the deduction of rollover fees by my previous superannuation fund (if any) from the benefits rolled over (subject to legislative restrictions).
- I understand that in certain cases Intrust Super may be required by law to deduct tax from the untaxed portion (if any) of the superannuation payment.
- I request that any contributions received after payment of my benefits be redirected to my account with Intrust Super.

My signature



Dated (ddmmyyyy)

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