

Transfer your super

Issued: 1 January 2016



Before you start

- Please complete a separate form for each fund you are transferring or rolling over from. If you are transferring into a new account, please also complete the application form in the relevant Product Disclosure Statement at www.esssuper.com.au/pds
- Your other fund may charge a fee for withdrawing your money and your withdrawal may affect any insurance cover you have with your other fund.
- Please post the **original** form and **certified** copy of your identification to ESSSuper.
- Alternatively, you can consolidate your super securely online through Members Online. Go to www.esssuper.com.au
- To transfer your insurance cover to the ESSSuper Accumulation Plan, complete the CommInsure *Insurance Transfer Form* available at www.esssuper.com.au/forms, or if you are joining the Accumulation Plan, you should have received this form with your Product Disclosure Statement.

Please complete this form in pen using CAPITAL letters and mark with an [X] where applicable.

Section 1

Your personal details

Member number (leave blank if you are a new ESSSuper member)

Title Mr Mrs Ms Miss Other (please specify)

Surname

Given names

Date of birth / /

Postal address

Suburb

State Postcode

Mark with an [X] if your postal and residential address are the same. If your residential address is different, please specify below.

Residential address


Suburb

State Postcode

Telephone (business hours) () (after hours) ()

Telephone (mobile)

Email address

 **By providing your email address you are authorising ESSSuper to send communications including statement notifications to that address. This authorisation will apply until it is revoked by you.**

Tax File Number - - You are not obliged by law to provide your TFN but there may be adverse tax consequences if you don't (refer to the relevant PDS or contact us for more information).

OFFICE USE ONLY INS FORM ATT Yes No

Section 2 How many super funds are you transferring over money from?

How many super funds are you transferring money from?

Note: If you are transferring over money from more than one fund, you will need to complete a separate form for each fund and provide a certified copy of identification for each transfer you have requested.

Section 3 Supporting documents – certified identification

Key persons who can certify documents include an Accountant, Bank Officer, Justice of the Peace, Police Officer, fulltime Teacher and Medical Practitioner.

You must provide certified identification proving you are the person to whom the superannuation entitlements belong to for each fund you are transferring or rolling over from.

Option 1: Current Driver's Licence or Passport

OR

Option 2: Either a birth certificate or extract, Australian citizenship certificate OR Centrelink pension card.

AND A letter addressed to you from Centrelink regarding a benefit payment, a letter from a Federal, State or local government body showing your name and residential address, e.g. rates notice OR a Tax Office Notice of Assessment.

For the full list go to www.esssuper.com.au/certify

Section 4 Details of fund you are transferring money from

Please provide the details of the super fund that you are transferring over from:

Member number

Name of fund

Postal address of fund

Suburb

State

Postcode

Telephone

Fund ABN

I want to rollover:

My whole benefit

Only part of my benefit. Please provide the amount. \$

Section 5 Details of ESSSuper product you are transferring to

Name of fund

 E S S U P E R

ABN

 8 5 - 8 9 4 - 6 3 7 - 0 3 7

Product you are rolling over to:

Accumulation Plan (SPIN: ESS0003AU)

Income Stream (SPIN: ESS0002AU)

Beneficiary Account (SPIN: ESS0001AU)

Please make cheques payable to ESSSuper and forward all documentation to:

ESSSuper
GPO Box 1974
Melbourne Vic 3001

Section 6

Declaration and signature

I authorise the rollover of the superannuation benefit I have listed on this form to ESSSuper, and in doing so:

- I acknowledge that I have read the relevant Product Disclosure Statement available from ESSSuper.
- I acknowledge and accept that the benefits in the Accumulation Plan, Income Streams and Beneficiary Account (including Spouse Accounts) are not guaranteed or underwritten by the Victorian Government or the Emergency Services Superannuation Board and that ESSSuper does not come under the jurisdiction of the Superannuation Complaints Tribunal.
- I understand and acknowledge the implications and effects of transferring my benefits from my superannuation fund to ESSSuper.
- I discharge the superannuation provider of my transferring fund of all further liability in respect of my superannuation benefit paid and transferred to ESSSuper.
- I understand that ESSSuper is required to deduct tax from any untaxed portion of my transfer.
- I understand that the transferring fund may deduct an exit fee.
- I authorise ESSSuper to make any necessary enquiries of the transferring fund to give effect to the transfer.
- 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 such as insurance cover, and do not require any further information.
- I have read and accept the statements relating to privacy in the relevant Product Disclosure Statement and I consent to providing ESSSuper with my personal information pursuant to the *Privacy and Data Protection Act 2014* for the purposes described in ESSSuper's Privacy Policy available at www.esssuper.com.au

Signature of
account holder

 PLEASE SIGN HERE

Date

/ /

Please forward this completed form to

ESSSuper GPO Box 1974, Melbourne Vic 3001

T 1300 650 161 | F 1300 766 757 | www.esssuper.com.au

At ESSSuper, we treat the privacy and confidentiality of our members' personal information seriously. We are committed to complying with the guidelines of the *Privacy and Data Protection Act 2014* and the *Health Records Act 2001 (Vic)*. To obtain a copy of ESSSuper's privacy policy go to our website at www.esssuper.com.au



1 July 2014

To Whom It May Concern,

Scheme: Emergency Services Superannuation Scheme
Status: Complying Fund
Basis: Exempt Public Sector Superannuation Scheme
SFN: 26 91 249 42
ABN: 85 894 637 037
SPIN Number: ESSSuper Accumulation Plan – ESS0003AU
ESSSuper Income Stream – ESS0002AU
ESSSuper Beneficiary Account – ESS0001AU

In accordance with section 10 (1) of the *Superannuation Industry (Supervision) Act 1993* (SIS Act) (definition of exempt public sector superannuation scheme refers) and as listed in Schedule 1AA of the *Superannuation Industry (Supervision) Regulations 1994*, the Emergency Services Superannuation Scheme (trading as ESSSuper – Emergency Services & State Super) is declared an “Exempt Public Sector Superannuation Scheme”.

Subsequently, under section 45 (6) of the SIS Act, the Scheme is deemed to be a complying superannuation fund for tax purposes.

ESSSuper is eligible to receive Superannuation Guarantee contributions from employers.

Yours sincerely

Mark Puli
Chief Executive Officer

Proudly serving our members