

## Rollover to Maritime Super

Please read the *Important Notes* overleaf before completing this form.

Please complete and sign this form and return to: Maritime Super, Locked Bag 2001, QVB Post Office NSW 1230.

### Your Personal Details

Membership Category

Stevedores division

Seafarers division

Maritime Super division

Member Number

Title (Mr/Mrs/Ms/Miss etc)

Gender

Male

Female

Surname

Given Names

Postal Address

Date of Birth

 /  / 

Phone Number

Email Address

Tax File Number

       

Read the *Important Notes* overleaf to learn what happens if you choose not to provide your TFN

### Maritime Super Membership Details – please insert your Maritime Super Member Number

Your Maritime Super Member Number

Fund Name

Maritime Super

RSE

R1001747

SPIN Number

n/a

ABN

77 455 663 441

Address

Locked Bag 2001, QVB Post Office, NSW 1230

Phone Number

1800 757 607

### Certificate of Compliance – Maritime Super

Maritime Super is a complying and resident regulated superannuation fund within the meaning of the *Superannuation Industry (Supervision) Act 1993* (SIS). Maritime Super accepts the transfer of superannuation benefits from other superannuation funds and will preserve any benefits transferred in accordance with Part 6 of the SIS Regulations.

### Your other fund's details – please provide details of the fund you are transferring from

Name of fund

Member Number

OR

SPIN Number (Product ID)

Address

ABN

I direct the trustee to transfer the following amount to Maritime Super:

All my benefits

OR

the amount of

\$

(nominate the amount you wish to transfer)

### Member's Declaration

By signing this form, I confirm that the information on this form is true and I have read and accepted the *Important Notes* overleaf. I request the trustee/administrator of my other fund to transfer the amount noted above to my Maritime Super membership.

I authorise Maritime Super and its administrator to access information about my other fund from its trustee/administrator and request the other fund trustee/administrator to advise both myself and Maritime Super in the event that the transfer request cannot be processed, additional information is required or it is delayed for any reason.

I am aware that I may ask my other fund for information on the effect this transfer may have on my benefits and do not require any further information.

I discharge my other fund, named above, from further liability in respect of the benefits transferred to Maritime Super.

(Tick ✓) I have attached certified copies of personal identification documentation. Refer to the '*Important Notes*' overleaf for further information. Please note that your other fund may not process your transfer request if you have not personally identified yourself to them.

Member's Signature

Date

 /  /

### Using this form

You may use this form to request the transfer of superannuation benefits you hold in another superannuation fund, RSA, approved deposit fund or deferred annuity to your Maritime Super membership. If you have an income stream product with Maritime Super, you may not add to the product by transferring additional funds. You will need to start a new income stream product with the transfer amount and will need to complete additional forms. Please contact Member Services to discuss.

Please note that this will only transfer your accumulated benefit to Maritime Super. Future contributions to your other fund will not be automatically redirected to Maritime Super. You must use a separate transfer form and attach separate copies of proof of identification for each superannuation membership you want to transfer to Maritime Super. If you copy the form, your original signature must be on each copy. If you require any assistance completing the form, please contact Member Services.

### Before transferring your super

When you transfer benefits from another superannuation fund to Maritime Super, your entitlements under that other fund may cease. You need to consider all relevant information before you make a decision to transfer your superannuation. If you ask for information about the effect of the transfer on your benefits, your other superannuation fund must give it to you. Some important points to consider are:

- whether you will be charged any fees for the transfer. Maritime Super will not charge you any fees for transferring the amount to your Maritime Super membership, however, your other fund may charge exit or withdrawal fees. Contact your other fund for details before completing this form.
- whether any insured death and/or disability benefits will be cancelled when you transfer your benefits. Ask your other fund and, if you will require additional insurance, speak with Member Services to discuss the range of insured benefits offered through Maritime Super. If the benefits provided through Maritime Super do not meet your insurance needs, we suggest that you speak with a financial planner before transferring your benefit.

### Quoting your tax file number (TFN)

Under the Superannuation Industry (Supervision) Act 1993, Maritime Super 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. Your fund's trustee may disclose your TFN to another superannuation provider, when your benefits are being transferred, unless you request the trustee 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 the trustee of your fund will have the following advantages (which may not otherwise apply):

- your superannuation fund 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 deductions for personal contributions

If you are self-employed or substantially self-employed (i.e. less than 10% of your total income is derived from employment), you may be entitled to a tax deduction for personal contributions to superannuation.

You must advise the trustee of your intention to claim a tax deduction before you withdraw those contributions from the fund. If you think you may be entitled to a tax deduction for any contributions you have made to your other fund in this or last financial year, you should contact the fund and complete and return their forms to claim a tax deduction before returning this form.

### Providing proof of identity

Superannuation legislation provides the following proof of identity documentation should accompany a transfer request. Your other fund may not process your transfer request without this:

- if you have changed your name, a certified copy of your marriage certificate, deed poll or change of name certificate from the Registry of Births, Deaths and Marriages; and
- a certified copy of your driver's licence or passport; or
- a certified copy of both:
  - your birth certificate, birth extract, or current Centrelink pension card; and
  - a letter from Centrelink or an ATO notice of assessment which is not more than 12 months old or a rates or Local Government notice which contains your name and address and is not more than 12 months old.

We will keep a copy of the personal identification documentation you provide for the transfer to meet your identification requirements for Maritime Super. You must provide certified copies of these documents. Someone at your local credit union office will be able to certify copies of your documents for you (if they have worked there continuously for five or more years). The following people can also certify documents:

- an officer or an authorised representative of an organisation that holds an Australian Financial Services Licence (AFSL) - which includes most banks, building societies and credit unions - with 5 years of continuous service (with one or more licensees)
- a finance company officer with 5 years of continuous service
- a police officer
- a permanent employee of Australia Post with 5 or more years of continuous service
- an Australian legal practitioner
- a registrar or deputy registrar of a court
- a magistrate or judge
- a Justice of the Peace
- a notary public
- a CEO of a Commonwealth court; or
- an Australian consular officer or Australian diplomatic officer.

### Privacy information and consents

Personal information is collected from or in respect of you to enable Maritime Super to administer your benefits. If you do not supply the required information, we may not be able to do so (and may be unable to action your requests). We may disclose this personal information to a number of parties, such as the administrator of the Fund, your employer(s), Maritime Super's professional advisers, insurer(s) and service providers, as required by law and/or as authorised by you. You may be entitled to gain access to personal information we may have on file in respect of you. If you wish to obtain access or have a complaint, please contact Member Services.