



# TASPLAN

## Rollover Request

If you wish to rollover money from more than one super fund into Tasplan please complete a separate form for each fund (you can photocopy this one)



TASPLAN  
Level 4, Reserve Bank Building  
111 Macquarie Street,  
Hobart TAS 7000  
GPO Box 1547, Hobart TAS 7001

Freecall: 1800 005 166  
Fax: 1300 737 736  
Email: info@tasplan.com.au  
Web: www.tasplan.com.au

When completing this form, please use a black pen and write in BLOCK letters.  
Once completed, please return to: TASPLAN GPO Box 1547 Hobart TAS 7001

### Section 1: Your details

Member Number										Date of Birth (DD/MM/YYYY)									
Mr/Mrs/Ms/Miss										Surname									
Given Names																			
Street Number / PO Box										Street Name									
Suburb / Town										State					Postcode				
Daytime contact number										TFN									
SFN										Tasplan SPIN									
1 2 3 4 8 1 9 4 0										T P N 0 1 0 0 A U									

### Section 2: Details of your other super fund

Name of other fund																			
Other fund membership number																			
Address of other fund																			
Street Number / PO Box										Street Name									
Suburb / Town										State					Postcode				
Contact phone number of other fund										Approximate amount being transferred									
										\$ , .									
Previous Surname (i.e. maiden name) if applicable																			
Australian Business Number (ABN) of Rollover Fund																			
Super Fund Number (SFN) of Rollover Fund																			

*TIP: all of the above information is on the last Member Statement you received from the other fund*

### Section 3: Proof of identity

- I have attached a certified copy of my Australian Driver's licence or passport
- OR
- I have attached certified copies of both:
- an Australian Centrelink pension card / birth certificate or extract / Australian citizenship certificate AND
  - Centrelink payment letter / Notice issued by Government or local council for provision of services (issued within the last 12 months)

**You MUST sign the Declaration overleaf for this request to be valid. (P.T.O.)**

## Section 4: Declaration

**Yes, I want to transfer my other super into Tasplan. I authorise Tasplan to make arrangements with the fund nominated to have my benefits rolled over to Tasplan and I understand that:**

- The trustee of my previous fund may be discharged from any further liability in respect of any amount it has transferred to Tasplan and all reporting requirements have been satisfied
- My old fund may be entitled to deduct any exit fees from the benefits being transferred - subject to legislative restrictions
- The Trustee of my old fund may pass my Tax File Number to Tasplan
- Tasplan may contact my other super funds to check on the process of my transfer. I authorise Tasplan to receive information about my transfer from my other super fund.
- The Trustee of the other fund will transfer to my Tasplan account any contributions received after payment of my benefit to Tasplan
- In certain cases Tasplan may be required by law to deduct tax from the untaxed portion (if any) of any superannuation benefits
- Changing funds may cancel any death cover and/or disability cover I have with my old fund
- That money from this transfer will be invested according to my existing instructions to Tasplan.

**I declare that to the best of my knowledge, the information I have provided above is true and correct in every particular, and I understand the information given on this form.**

Your signature



Date (DD/MM/YYYY)

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### Privacy

Protecting your personal information is important to Tasplan. We will only use it for the purpose of managing your superannuation account. Full details of the way in which Tasplan will protect your personal details in respect to collection, storage, quality, use and disclosure are contained in the Product Disclosure Statement (PDS) issued to you when you joined the fund.

A copy of the Tasplan Privacy Policy can be viewed on its website at [www.tasplan.com.au](http://www.tasplan.com.au) or can be read in the PDS which is available by contacting 1800 005 166.

### Things you need to consider when transferring your superannuation

When you transfer your superannuation, your entitlements under that fund may cease. You need to consider all relevant information before you make a decision to transfer your superannuation.

If you ask for information, your superannuation provider must give it to you. Some of the points you may consider are:

**Fees** – your old fund must give you information about any exit or withdrawal fees. If you are not aware of the fees that may apply, you should contact your fund for further information before completing this form. The fees could include administration fees as well as exit or withdrawal fees. Tasplan does not charge entry or deposit fees on transfer.

**Death and disability benefits** – your old fund may insure you against death, illness or an accident which leaves you unable to return to work.

By transferring out of your old fund, you may lose any insurance entitlements you have. You should compare any cover that you are losing with your cover under Tasplan.

For further information about Tasplan's benefits and how they compare with other funds, please call us on 1800 005 166. You may wish to obtain professional financial advice before making a decision.

### What happens if I do not quote my Tax File Number (TFN)?

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 TFN may be disclosed to another superannuation provider, when your benefits are being transferred, unless

you request in writing that your TFN is not to be disclosed to any other trustee.

It is not compulsory to provide your TFN to Tasplan. However if you do not give us your Tax File Number,

- you may pay more tax on your superannuation benefits than you have to (you may get this back at the end of the financial year in your income tax assessment)
- it may be more difficult to find your superannuation benefits if you change address without notifying your fund or to amalgamate any multiple superannuation accounts
- Tasplan will not be able to accept any voluntary contributions from you
- any superannuation contribution paid by your employer on your behalf will be accepted but will be subject to tax at the top personal marginal tax rate, and
- this may delay payment of your benefits.

### Completing proof of identity

The fund you are transferring out of will require documentation with this transfer request to prove you are the person to whom the superannuation entitlements belong. Please attach copies to this form before returning it to Tasplan so your transfer request can be processed as quickly as possible.

#### Acceptable documents

The following documents may be used. Either one of the following photo documents only:

- Australian driver's licence
- Any passport.

OR one of the following non-photo document A:

- Australian pension card (Centrelink)
- Any birth certificate or extract
- Australian citizenship certificate.

AND one of the following non-photo document B:

- Centrelink letter of entitlement to benefits
- Notice issued by Government or local council for provision of services Eg. ATO Notice of Assessment/ local rates notice (issued within the last 12 months).

#### 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 (e.g. Justice of the Peace, Australia Post employee, etc) and date.

The following people can certify copies of the originals as true and correct copies:

- A Justice of the Peace
- Police Officer
- Notary Public Officer
- Australian consular or diplomatic officer
- Finance company officer (must have 5+ years of continuous service with one or more finance corporations)
- Legal practitioner
- Australia Post employee (any employee with 5 years' service)
- An officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having 5+ years continuous service with one or more licensees.

This information is of a general nature only. It has been prepared without taking into account your particular financial needs, circumstances and objectives. You should assess your own financial situation and read the Product Disclosure Statement (PDS) relating to the products before making a decision based on this information. You may wish to seek the help of an adviser to do so. Please call 1800 005 166 to obtain a copy of the Tasplan PDS.