

Catholic Super

Request to Consolidate Your Super

Roll other super money into Catholic Super

Just fill in this form and send it back to Catholic Super. It's that simple. We will contact your other fund managers and look after all the transfer details. There is no charge from Catholic Super for this service. If you have more than one fund you want to transfer, you can photocopy this form. Your transfer will be processed faster if you attach a copy of a recent Member Statement from your old super fund. Check the back of this form for more helpful notes about transferring.

If you need help

For assistance call the Catholic Super Service Centre on **1300 655 002**.

Step 1 – Complete your personal details
Please print in black or blue pen,
in uppercase, one character per box.
A ✓

Title Mr Mrs Ms Miss Other Date of birth / /

Given names

Surname

Member number

Residential address

Suburb State Postcode

Postal address (if different from above)

Suburb State Postcode

Daytime Telephone - Mobile

Issued by CSF Pty Limited ABN 30 006 169 286; AFSL 246664 as Trustee of the MyLifeMyMoney Superannuation Fund ABN 50 237 896 957.



Step 2 – Provide details of your previous super fund

Name of previous fund or policy

Address of previous fund

Suburb

State

Postcode

Telephone

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Membership or policy number

Previous fund's Unique Superannuation Identifier*

Name of old employer who contributed to the previous fund

Date ceased employment with this employer

 / /

Approximate value of total benefit

\$, ,

I am transferring ():

Full amount Partial amount

* If you are unsure of your previous fund's Unique Superannuation Identifier, you will need to contact your previous fund.

Step 3 – How do you want to prove your identity?

You will need to provide proof of your identity when you take a cash payment or rollover/transfer to another super fund. You should read the information attached to this form called "How to apply for a super payout" to check what proof of ID is required.

Choose () one of the two options below:

Use my Tax File Number (TFN)

This option is only available if you want to rollover/transfer your super to a complying super fund (if you wish to take a cash payment or rollover/transfer your super to a SMSF, you will need to provide certified proof of identity).

Catholic Super might already hold your TFN. If you're not sure if you have previously provided it, you can choose to do so now. You do not have to provide your TFN, but if you do, this will ensure that any benefit you take from Catholic Super does not incur additional tax. *Please also refer to the 'How to apply for a super payout' leaflet for additional information about providing your TFN.*

Enter your TFN here

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By providing your TFN, you are authorising us to give this information to your other super fund.

Please note: We will validate your TFN and personal details with the Australian Tax Office. If we cannot confirm an exact match with the ATO's records, you will be required to provide full Proof of Identity (see below) and your payout will be delayed.

I have attached certified proof of identity documents. For full details on completing proof of identity, refer to the "Completing proof of identity" fact sheet on the fund's website at www.csf.com.au or call the Catholic Super Service Centre on **1300 655 002**.



Your Privacy

The Fund is administered by us along with our service provider, Mercer Outsourcing (Australia) Pty Ltd. We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information about the other products and services offered by us and our related companies. If you do not wish to receive marketing material, please contact us on **1300 655 002**.

Our Privacy Policies are available to view at www.csf.com.au or you can obtain a copy by contacting us on **1300 655 002**.

If you do not provide the personal information requested, we may not be able to manage your superannuation.

We may sometimes collect information about you from third parties such as your employer, a previous super fund, your financial adviser, our related entities and publicly available sources.

We may disclose your information to various organisations in order to manage your super, including your employer, our professional advisors, insurers, our related companies which provide services or products relevant to the provision of your super, any relevant government authority that requires your personal information to be disclosed, and our other service providers used to assist with managing your super.

In managing your super your personal information will be disclosed to service providers in another country, most likely to Mercer's processing centre in India. Our Privacy Policies list all other relevant offshore locations.

Our Privacy Policies set out in more detail how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact us on **1300 655 002** or write to the Catholic Super Privacy Officer, GPO BOX 4303, Melbourne, VIC 3001.

Step 4 – Sign the form

I request that you transfer the total value held in respect of me for the above super fund or policy to Catholic Super:

- I understand that on payment by my previous super fund, I discharge that super fund from any further liability in respect of the amount transferred
- I approve the deduction of any appropriate exit fees from the amount transferred subject to legislative restrictions
- I request that any further contributions received by my previous super fund after my payment, be redirected to my membership with Catholic Super.
- I understand that I will receive confirmation once my money has been received in Catholic Super.
- I understand that I have the right to ask my previous super fund for information that I reasonably require for the purpose of understanding any super entitlements I may have in that fund, including information about any fees and charges that may apply to the transfer and information about the effect of the transfer on any entitlements I have in my previous super fund. I confirm that I do not require such information from my previous fund.
- I understand and consent to my information being collected, disclosed and used in the manner set out in this form.

Signature

Date

X

/ /



Notes

Please ensure that all details on the front of this form are completed.

Your old fund may charge an exit fee and/or set a buy/sell margin which would mean a reduction in the amount transferred. Please check with the administrator of your old fund for details of any fees. No entry fee will be charged by Catholic Super on receipt of this benefit.

Also, some super funds have a waiting period. They are commonly 30, 60 or 90 days, and in certain circumstances, up to 6 or 9 months.

If there is a delay in processing your transfer, it may be that a waiting period applies at your old fund.

Do not complete this form if you:

- Are still working for your old employer on a casual basis and expect that employer to pay further contributions on your behalf into your old fund; or
- Have advised the Australian Taxation Office to pay an amount from the Superannuation Holding Accounts Reserve (SHAR) to your old fund; or
- Have taken an option under your old fund to continue your insurance cover for a specific period, which has not yet expired; or
- Are not comfortable with, or sure of the exit charges that apply from your old fund.

Transfers are simple... here's what you do

Step 1

Find out where your old super is. You'll need the name of your old fund and your membership number. Start by gathering the most recent statements of all your super funds. If you can't find them, call your old employer(s). They'll be able to tell you which fund your super was paid to and provide a contact number for you **OR** you can contact the Lost Members Register at the **Australian Tax Office** on telephone **131 020** which has a register of lost superannuation money.

Step 2

Fill in the form overleaf. You'll need one for each fund, so you can make copies of this form or call the Catholic Super Service Centre on **1300 655 002** for more forms. Your transfer will be processed faster if you attach a copy of your last statement from your old fund(s).

Step 3

Attach proof of identity (certified where required)

Step 4

Send your completed form(s) and proof of identity to **Catholic Super**. Once we have received it we will contact your old fund and arrange for your money to be deposited into your Catholic Super account.

Step 5

Once your transfer-in has been deposited to your account, we will send you confirmation that your money has been deposited. Your old fund should also send you confirmation that they have closed your account and transferred your money to your Catholic Super account. While Catholic Super endeavours to complete your transfer quickly, delays may be experienced due to administration processing times of your old fund.

Requirements for the old fund administrator

Being Super stream Compliant, payments are done via EFT.

Please return your completed form to Catholic Super, GPO Box 4303, Melbourne, VIC 3001.

