



Roll over your super to Prime Super

Use this form to roll over super from another fund into your Prime Super account.

Please read the following information before you complete this form

Consolidating your superannuation (super) can save you time and money. If you have multiple accounts you are likely to be doubling up on fees, which will eat into your retirement savings. One account is easier to manage and saves on fees.

Roll over and consolidate your super

To roll money into Prime Super, you need to know some details of your other funds, including their Australian Business Number (ABN) and Unique Superannuation Identifier (USI). These are usually available on their website or you can call them.

Once you have these details, you have four options to consolidate your super:

1. consolidate using your Prime Super MemberOnline account: if you have a MemberOnline account simply log in to your account and you can transfer money from a number of different funds.
2. consolidate using your myGov account: you can use your myGov account to consolidate your super and search for other accounts that you might have. You can login to your myGov account, provide your Tax File Number (TFN) and search the Australian Taxation Office (ATO) for other super accounts you have. You can select 'transfer super' option to transfer this money into Prime Super.
3. call us on 1800 675 839 and we can do it over the phone
4. complete and submit this Rollover form.

Things to consider

When you transfer your super from another fund, any entitlements you have in that fund will cease. Consider the following before you consolidate:

Closing your account – if you or your employer are making contributions to the fund from which you are transferring money, you need to change your instructions to make sure your future contributions go to your preferred fund.

Insurance – it is important to review your insurance arrangements before you consolidate and close other super accounts as you will lose any insurance cover from the funds you have left. Ensure that your current fund, Prime Super, provides adequate insurance cover for your needs.

If you are completing a printed copy of this form, please use pen and BLOCK letters. If you have any questions, please contact us.

1 Member details

Surname	Given names	Title
<input type="text"/>	<input type="text"/>	<input type="text"/>
Member number	Email	
<input type="text"/>	<input type="text"/>	
Date of birth (DD/MM/YYYY)	Mobile number	Phone number
<input type="text"/>	<input type="text"/>	<input type="text"/>
Other/Previous names (if applicable)		
<input type="text"/>		
Residential address		
<input type="text"/>		
Town/Suburb/City	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Postal address (if the fund you are transferring from has a different address for you, please provide the details below)		
<input type="text"/>		
Town/Suburb/City	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

2 Tax File Number (TFN)

Tax File Number*

* If you have already provided your TFN to Prime Super you do not need to provide it again.

Under the Superannuation Industry (Supervision) Act 1993, the Trustee is authorised to collect your TFN, which will only be used for lawful purposes. These purposes may change as a result of legislative change. The Trustee may disclose your TFN to another super fund, when your benefits are being transferred, unless you request in writing to the Trustee that your TFN not be disclosed to any other super fund. You are not legally required to provide your TFN. However giving your TFN to us will have the following advantages, which may not otherwise apply:

- we will be able to accept all types of contributions to your account(s)
- any concessions on contributions will be taxed at a lower rate
- other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your super benefits
- it will make it much easier to trace different super accounts in your name.

Your TFN will otherwise remain confidential.

3 Fund details

Please provide the details of the fund FROM which you are transferring super. If you would like to transfer your super from more than one other fund, you will need to complete a separate form for each fund.

From

Name of super fund

Member number

Australian Business Number (ABN)

Unique Superannuation Identifier (USI)

To

Name of super fund

Fund phone number

Member number

Australian Business Number (ABN)

Unique Superannuation Identifier (USI)

4 Request a total or partial rollover

Please tick one of the following boxes to choose between a partial rollover or total rollover of your super account balance

Total rollover

Tick this box if you would like to transfer the whole balance into Prime Super.

Partial rollover

Tick this box if you would like to transfer a nominated amount of \$ to Prime Super.

5 Declaration

By signing this form, I declare that:

- I have fully read this form and the information completed is true and correct
- I am aware I may ask the fund I am transferring my super FROM for information about any fees or charges that may apply, or any other information about the effect of this transfer on my super. I have obtained any information
- I require and/or I do not require any further information
- I approve the deduction of exit fees and government taxes (if any) from the benefits transferred (subject to legislative restrictions)
- I discharge the provider of my FROM fund of all further

liability in respect of the super benefits paid and transferred to my TO fund

- I request and consent to the transfer of super as described above and authorise the provider of each super fund to give effect to this transfer
- I understand that the personal information collected is for purposes outlined in Prime Super's Privacy Statement. The information is only used for the purpose of administering Prime Super membership or related purpose. Further information about privacy can be found in the Prime Super Privacy statement at www.primesuper.com.au/privacy-statement/ or by contacting the fund.

Member signature

Date

Return this form to us via by mail or email

mail: Prime Super
Reply Paid 85860
PARRAMATTA NSW 2124
No stamp required

email: administration@primesuper.com.au
visit: primesuper.com.au
call: 1800 675 839