

# Rollover Form



**ONLINE:** submit your rollover request quickly and easily online at [guildsuper.com.au](http://guildsuper.com.au)

**BY FORM:** Complete this form and return it to: **GuildSuper, GPO Box 1088 Melbourne VIC 3001.**

Please complete all fields otherwise your rollover request may be delayed.

If you wish to rollover from more than one super fund, then you must complete a separate form for each rollover. You can download extra forms from [guildsuper.com.au](http://guildsuper.com.au).

## 1. Personal details (please provide your current details)

Member no.	<input type="text"/>	Date of birth	<input type="text"/>	Mr	<input type="checkbox"/>	Mrs	<input type="checkbox"/>	Ms	<input type="checkbox"/>	Miss	<input type="checkbox"/>	Other (Specify):	<input type="text"/>
Surname	<input type="text"/>			Given name(s)	<input type="text"/>								
Phone (H)	<input type="text"/>	Phone (W)	<input type="text"/>	Mobile phone	<input type="text"/>								
Email	<input type="text"/>			Tax file number (TFN)*	<input type="text"/>								
<b>RESIDENTIAL ADDRESS</b>													
Street no.	<input type="text"/>	Street name	<input type="text"/>										
Suburb	<input type="text"/>			State	<input type="text"/>	Postcode	<input type="text"/>						
<b>POSTAL ADDRESS (if different to residential address)</b>													
Street no./ PO Box	<input type="text"/>	Street name	<input type="text"/>										
Suburb	<input type="text"/>			State	<input type="text"/>	Postcode	<input type="text"/>						

\* By providing your TFN, your rollover may be processed faster. Under the *Superannuation Industry (Supervision) Act 1993*, you are not obliged to disclose your TFN, but there may be tax consequences. Refer to the GuildSuper PDS for information about quoting your TFN.

## 2. Transferring Fund's details

Fund name	<input type="text"/>			Your member/account number	<input type="text"/>			
Fund Australian Business Number (ABN)	<input type="text"/>			Fund Unique Superannuation Identifier (USI)	<input type="text"/>			
<b>I wish to</b> (tick only one box):								
<input type="checkbox"/>	close this account and transfer all monies to my GuildSuper account, OR							
<input type="checkbox"/>	transfer only	\$	<input type="text"/>	to my GuildSuper account.				

## 3. Do you want to claim a tax deduction on personal contributions?

From 1 July 2017, if you have made personal, after-tax contributions into the other super fund/s and wish to claim a tax deduction on those contributions, then you must complete the *Notice of intent to claim or vary a deduction for personal super contributions* form (download from [ato.gov.au](http://ato.gov.au)) and send that to the other fund/s. They will then make sure your personal contributions are recorded as concessional contributions.

If you do not provide the other fund/s with the *Notice of intent to claim or vary a deduction for personal super contributions* form before they process the rollover, then you will not be able to claim a tax deduction on the personal contributions you have made up to the rollover date.

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## 4. Declaration and authorisation

- I declare I have fully read this form and the information completed is true and correct.
- I am aware that I can ask my other super fund (the transferring fund as shown in Section 2) for information that I reasonably require for the purpose of understanding any benefit entitlements I may have in that fund including information about any fees or charges that may apply to the proposed transfer, and any other information about the effect this transfer may have on my benefits, and I have either obtained this information or do not require it.
- I understand that the transferring fund may apply fees and charges to the transfer or that the transfer may result in the loss of benefits (e.g. insurance benefits) provided by the transferring fund.
- I understand that tax may be deducted by the Trustee of the transferring fund from any untaxed portion of my benefit.
- For full withdrawals, I discharge the Trustee of the transferring fund of all liability in respect of benefits paid and transferred into my GuildSuper account.
- I hereby request and consent to the transfer of superannuation monies as described above from the transferring fund to my GuildSuper account, which is part of the Guild Retirement Fund, and authorise the Trustee of the transferring fund and the Trustee of the Guild Retirement Fund to give effect to this transfer.
- I hereby request that the Trustee of the transferring fund give effect to this transfer regardless of whether or not my employer may make further contributions to the transferring fund or whether or not I have terminated employment with the employer that contributes to the transferring fund on my behalf.

Signature

Date

X

### Information about the Guild Retirement Fund

- The Trustee of the Fund is Guild Trustee Services Pty Limited (AFS Licence No. 233815. RSE Licence No. L0000611)
- The ABN of the Fund is 22 599 554 834
- The GuildSuper Unique Superannuation Identifier (USI) is 22 599 554 834 401
- The Superannuation Fund Number (SFN) for the Fund is 511643050 and the Fund Registration No. is R1000030

Please make cheques payable to **GuildSuper**. Cheques and form(s) are to be sent to: **GuildSuper, GPO Box 1088 Melbourne VIC 3001**

## Need help?

Should you have any further enquiries, please call the Member Services Team on **1300 361 477**.

GuildSuper use only

Consultant's name

Consultant's code

We collect your personal information for purposes as detailed in the Privacy Statement and Privacy Policy which you can access at [guildsuper.com.au/privacy](https://guildsuper.com.au/privacy). Call the Member Services Team on 1300 361 477 to access or update the personal information we hold about you.

Issued by Guild Trustee Services Pty Limited ABN 84 068 826 728 AFS Licence No. 233815 RSE Licence No. L0000611 as Trustee of the Guild Retirement Fund ABN 22 599 554 834 (which includes GuildSuper and Child Care Super) MySuper Authorisation No. 22599554834526.

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