

# Combine my super – full rollover form



## Save time, go online!

The quickest way to roll your super into UniSuper is by logging in to your account at [unisuper.com.au](https://unisuper.com.au).

Use this form to transfer the **entire** balance of your super from another fund to your UniSuper account. If you're rolling over more than one account, you'll need to complete a form for each rollover. To arrange a partial rollover into UniSuper, please contact your other fund.

Please note: If you're a UniSuper pension member and you don't have an active super account, we'll open an Accumulation 1 account on your behalf to receive your rollover. You won't receive any default insurance cover and your rollover will be invested in our default investment option (Balanced).

## BEFORE YOU ROLLOVER

If you rollover your full balance, your other super account may close. You may have insurance that you'll lose, incur fees or have tax obligations. If you're unsure or have insurance you want to keep, you may want to speak to a financial adviser.

You should also confirm your personal details are current and correct with both us and your other fund before you begin.

## VERIFYING YOUR IDENTITY

We'll verify your identity using your TFN. If you haven't provided your TFN or it can't be validated, we'll require you to send us a certified copy of your identification with your form.

## WHEN WILL THE ROLLOVER BE COMPLETED?

Rollovers generally take about 5 business days to be completed. Once we receive your form, we'll send a request to your previous fund on your behalf.

There can sometimes be delays if the information you provide isn't correct or if your previous fund requires additional information. It's best to follow up with your previous fund to make sure your request is processed promptly.

You can check to see if your rollover request has been successfully completed by logging in to your account at [unisuper.com.au](https://unisuper.com.au) or by calling us on **1800 331 685**.

## SELF-MANAGED SUPER FUNDS (SMSFS)

You can't use this form if you're looking to rollover a self-managed super fund (SMSFs). Rollovers from SMSFs must be initiated by the SMSF administrator.

Any rollover amounts will need to be sent electronically via an approved SuperStream payment method. Your administrator will also need to notify UniSuper via an approved SuperStream channel. Please provide your administrator with the UniSuper details listed below to arrange a rollover from your SMSF.

**Fund: UniSuper**

**UniSuper USI: 91 385 943 850 001**

**UniSuper ABN: 91 385 943 850**

**The name of your UniSuper Product (Accumulation 1 or 2, Defined Benefit Division, Personal Account)**

## SECTION 1 YOUR DETAILS

- ▶ Please complete in BLACK or BLUE BALL POINT PEN using CAPITAL letters. Cross (X) where required.
- ▶ Please note all fields are mandatory apart from your tax file number (TFN). Please read information about providing your TFN at [unisuper.com.au/tfn](https://unisuper.com.au/tfn). You can also request a copy of that information by calling **1800 331 685**.

Member number

If you're unsure of your member or account number, refer to your most recent UniSuper correspondence or call us on **1800 331 685**.

Title

 Mr  Mrs  Ms  Dr  Professor  Other 

Surname

Given name

Date of birth (DD/MM/YYYY)

Gender

 Male  Female

**SECTION 1** CONTINUED

Daytime contact number	<input type="text"/>	
Email address	<input type="text"/>	
Your tax file number (TFN)	<input type="text"/>	<input type="checkbox"/> I don't wish to quote my TFN.
Residential address (not PO Box)	<input type="text"/>	
Suburb/Town	<input type="text"/>	
State	<input type="text"/>	Postcode <input type="text"/>
Country (if not Australia)	<input type="text"/>	

**SECTION 2** OTHER FUND DETAILS

➤ Refer to the latest correspondence from your other fund to help you complete these details.

Membership/policy number of previous fund	<input type="text"/>	
Full name of previous fund	<input type="text"/>	
Please complete <b>two</b> of the following:		
Australian Business Number (ABN) of previous fund	<input type="text"/>	<input type="checkbox"/>
Unique Superannuation Identifier (USI)	<input type="text"/>	
Product name/ID	<input type="text"/>	
Phone number of previous fund	<input type="text"/>	
Address of previous fund (number and street, or PO Box)	<input type="text"/>	
Suburb/Town	<input type="text"/>	
State	<input type="text"/>	Postcode <input type="text"/>

## SECTION 3 YOUR DECLARATION AND SIGNATURE

➤ Please read this declaration before you sign and date or upload your form to MemberOnline.

I declare that:

- the information provided on this form is true and correct
- I consent to the rollover of superannuation as described on this form and authorise the superannuation provider to give effect to my rollover request
- I authorise UniSuper (or its agents) to contact my other super fund regarding this request to rollover my super from that fund into my UniSuper account
- I am aware that I may ask the trustee of my previous fund for all the information that I need to understand my benefit entitlements in that fund and the effect of a rollover on my benefit entitlements and understand and acknowledge the implications of rolling over my benefit from my previous fund into UniSuper
- I discharge the trustee of my previous fund from all further liability in respect of the benefit rolled over to UniSuper
- I acknowledge and understand that rollovers retain their preservation status and that preserved benefits must generally remain in the superannuation system until I reach my preservation age and permanently retire from the workforce
- I authorise UniSuper to invest my rollover in accordance with my current investment instructions
- I understand that if I do not have a future contributions strategy or rollover strategy, my rollover will be invested in the Balanced investment option which is the fund's default investment option and its MySuper offering
- I consent to my tax file number (if provided) being disclosed for the purposes of consolidating my account
- I consent to my personal information being used in accordance with UniSuper's Privacy Policy.

Signature

Date

<input type="text"/>	<input type="text"/>	<input type="text"/>
DD	MM	YYYY

### Returning your form

Mail to:

**UniSuper**

**Level 1, 385 Bourke Street**

**Melbourne VIC 3000**

Email to [enquiry@unisuper.com.au](mailto:enquiry@unisuper.com.au)

### PRIVACY STATEMENT

UniSuper is committed to protecting your personal information in accordance with privacy law obligations. The information that you provide to UniSuper on this form is collected and used in accordance with our Privacy Policy which can be found online at [unisuper.com.au/privacy](https://unisuper.com.au/privacy). If you have any privacy related questions, please call **1800 331 685**.

### Need help?

If you need more information or help to complete this form:

- email [enquiry@unisuper.com.au](mailto:enquiry@unisuper.com.au)
- call **1800 331 685**.

# Your guide to proof of identity

We take looking after your retirement savings very seriously—which is why you need to prove your identity (ID) before making withdrawals or other important changes to your account.

## Verify your identity online

Proving your identity online is quick and easy—you'll know as soon as your identity gets verified. Log in at [unisuper.com.au/memberonline](https://unisuper.com.au/memberonline) to get started. Only Australian residents with Australian documents currently living in Australia can verify their identity through their online account.

You'll need one or more of the following valid documents:

- Australian passport
- Australian visa
- Australian citizenship certificate
- Australian birth certificate
- Australian driver's licence
- Medicare card
- Centrelink card
- state and federal electoral roll details
- Notice of Assessment from the Australian Taxation Office (less than 12 months old) containing your name and residential address.

Make sure you've updated your current personal details with relevant government agencies before you begin the process of verifying your identity online. We use online government and public databases to securely verify your identity.

## Or send us certified copies of your ID

You can also send us certified copies of your ID. The following guide explains the types of documents we can accept and how to ensure they're correctly certified.

### ALLOW US TO VERIFY YOUR IDENTITY

In some cases and on some of our forms, we can verify your identity on your behalf if the document(s) you provide haven't been certified correctly or can't be read. All you need to do is give us consent and we'll try to verify your identity electronically using those documents. We'll let you know if the process wasn't successful.

### Why provide your TFN?

Giving us your tax file number (TFN) means we can process rollover and transfer requests to another super fund without additional proof of identity. If your TFN can't be validated, or you want to transfer to a self-managed super fund or organise a benefit payment, you'll still need to give us certified copies of your ID.

Visit [unisuper.com.au/memberonline](https://unisuper.com.au/memberonline) to provide your TFN online.

### STEP 1: COLLECT ACCEPTABLE DOCUMENTS

We'll accept either one document from List A or two documents from List B.

#### LIST A

##### A certified copy of a:

- current driver licence
- current passport (Australian passports that haven't expired more than two years ago are also acceptable).

##### State government-issued ID cards

We want it to be as convenient as possible for you to change or verify your details with us. You can provide a certified copy of the following valid state government-issued ID cards *instead of* your current driver licence or passport:

- Victorian proof of age card
- Queensland proof of age card
- South Australian proof of age card
- New South Wales photo card
- Western Australia photo card
- Tasmanian personal information card
- Australian Capital Territory (ACT) proof of identity card
- Northern Territory evidence of age card.

## LIST B

### A certified copy of a:

- birth certificate or birth extract
- Australian citizenship certificate
- a pension card issued by Centrelink that entitles the person to financial benefits.

### And:

- Notice of Assessment from the Australian Taxation Office (less than 12 months old) containing your name and residential address
- letter from Centrelink regarding a government assistance payment
- rates notice from local council (less than 12 months old) containing your name and residential address
- electricity, gas or water bill dated within the past three months that contains your name and residential address.

## STEP 2: CERTIFY YOUR DOCUMENTS

Take your original document(s) and a clear photocopy of both sides of the original document to an authorised person—we'll list who can authorise your documents below.

### Your ID must be properly certified

The authorised person will need to:

1. sight the original document, and the copy, to ensure both documents are identical, and
2. write or stamp 'this is a true and correct copy of the original document I have sighted' or 'certified true copy', followed by their:
  - signature
  - printed name
  - qualification (e.g. Magistrate), and
  - date.

If you've changed your name or are signing on behalf of another member, we require that you prove the 'link' between you and the name change, or other person. Use a certified copy of one of the following documents as well as your other certified ID.

PURPOSE	SUITABLE LINKING DOCUMENT
Change of name	<ul style="list-style-type: none"><li>▪ Marriage certificate</li><li>▪ Deed poll or change of name certificate from the Registry of Births, Deaths and Marriages</li></ul>
Signing on behalf of another member	<ul style="list-style-type: none"><li>▪ Power of Attorney</li><li>▪ Guardianship papers</li></ul>

When having your documents certified, remember:

- all pages must be certified
- the copy of the document must be certified—not on a separate page attached to the document
- certified copies of your documents must have an original signature
- faxed or emailed copies won't be accepted
- documents not written in English must be accompanied by an English translation prepared by an accredited translator
- documents certified more than a year ago won't be accepted.

## Who can certify your documents

Some of the people authorised to certify IDs include:

1. A person currently licensed or registered under a state or territory law to practise in one of the following occupations:
  - architect
  - nurse
  - chiropractor
  - occupational therapist
  - conveyancer
  - optometrist
  - dentist
  - patent or trade marks attorney
  - financial adviser or financial planner
  - pharmacist
  - legal practitioner
  - physiotherapist
  - medical practitioner
  - psychologist
  - midwife
  - veterinary surgeon.
2. One of the following persons:
  - teacher employed full-time at a school or tertiary education institution
  - agent of the Australian Postal Corporation who is in charge of, or a permanent employee with two or more years of continuous service with, an office supplying postal services to the public
  - bank, building society, credit union or finance company officer with two or more years of continuous service
  - clerk, master, registrar or deputy registrar of a court
  - judge of a court or a magistrate
  - justice of the peace
  - member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants, the Institute of Public Accountants or the Association of Taxation and Management Accountants, or a Fellow of the National Tax Accountants' Association
  - notary public, and
  - police officer.

## Members residing overseas

If you live overseas, the following people are authorised to certify identification documents:

- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the *Consular Fees Act 1955*)
- employee of the Commonwealth or the Australian Trade Commission who is authorised and exercising his or her function in a country or place outside Australia.
- a person authorised as a notary public in a foreign country.

Your documents must be certified by a person with an Australian connection. We won't accept certifications by someone licensed or registered to practise outside of Australia in an occupation listed above, or who holds a position in a foreign country—except for a foreign notary public.

## When will my form be processed?

If you've provided a correctly completed form (and any certified ID or other paperwork required), we'll aim to process your request as soon as possible. Not providing correct information may delay us processing your request. Please allow 3-5 business days for your form to arrive. We'll contact you if we have any queries in relation to your request.

This information is of a general nature only and includes general advice. It has been prepared without taking into account your individual objectives, financial situation or needs. Before making any decision in relation to your UniSuper membership, you should consider your personal circumstances, the relevant product disclosure statement for your membership category and whether to consult a licensed financial adviser. This information is current as at July 2023 and is based on our understanding of legislation at that date. Information is subject to change. To the extent that this fact sheet contains information which is inconsistent with the UniSuper Trust Deed and Regulations (together the Trust Deed), the Trust Deed will prevail. Issued by: UniSuper Management Pty Ltd ABN 91 006 961 799, AFSL No. 235907 on behalf of UniSuper Limited the trustee of UniSuper, Level 1, 385 Bourke Street, Melbourne Vic 3000.

Fund: UniSuper, ABN 91 385 943 850 | Trustee: UniSuper Limited, ABN 54 006 027 121 AFSL 492806 | Date: July 2023 UNIS000F80 0723