

Super Savings – Business Consolidate Your Super



Did you know you can combine your super online?
Simply visit australianretirementtrust.com.au/consolidate and we'll do the searching for you.

13 11 84 | australianretirementtrust.com.au
Reply Paid 2924 Brisbane Qld 4001

Use this form to consolidate (rollover) your super from other accounts into your Australian Retirement Trust account. Before combining your super, consider the potential loss of insurance and other benefits that you may have with your existing fund. Also, think about where your future employer contributions will be paid.

Please provide us with as much information as possible and ensure your form is signed and dated. *DENOTES MANDATORY FIELD.

Member number

if already a member

1 Personal details

Title	First name*	Middle name		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
Last name*	Date of birth (DD/MM/YYYY)*		Gender*	
<input type="text"/>	<input type="text"/>		<input type="radio"/> M <input type="radio"/> F	
Street address / PO Box*				
<input type="text"/>				
Suburb/Town*	State*	Postcode*	Home phone number	Daytime phone number*
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Personal email address			Mobile phone number*	
<input type="text"/>			<input type="text"/>	

Note: Where we can we'll provide your documents, including statements and notices of changes to your account, electronically. We'll email or SMS you when information is ready to view in [Member Online](#). If you would prefer information is posted to you, change your preferences in [Member Online](#), the [Australian Retirement Trust app](#), or by contacting us.

Residential street address (if the same as above leave blank)*	Suburb/Town*	State*	Postcode*
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Tax file number (TFN) details – Australian Retirement Trust can use your TFN to help you bring your super together.

My TFN

Look for other super for me

By ticking this box, you consent to Australian Retirement Trust using the Australian Taxation Office (ATO) SuperMatch service to use your TFN to search for any other super you may have. This super may be with other super funds or held with the ATO. If we find money with the ATO, you also consent to Australian Retirement Trust requesting the ATO transfer these amounts into your Super Savings – Business account where possible. If we find money with other super funds, you'll have the choice of whether you transfer this or not. To help keep track of your super, we'll also conduct an ongoing annual search on your behalf. If at any time you wish to revoke your consent, please contact Australian Retirement Trust on **13 11 84**.

Turn over to learn how you can avoid extra tax by providing your TFN. By giving us your TFN, you are authorising us to disclose this information to your other super fund(s). If you don't provide your TFN, or the other fund is unable to match your details with the ATO, you may be asked for further documentation to verify your identity.

2 Have your details changed?

Your previous address (If your address held by your other super fund is different to your current address, please supply your previous address details below.)

Street address / PO Box	Suburb/Town	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Have you been known by any other name? (e.g. maiden name)

Other/previous name?

If your name held by your other super fund is different to your name with Australian Retirement Trust you will need to change your name with your other fund before you submit this form.

[➔ Please continue over page](#)

3 Other super account(s) that you want to combine with your Super Savings – Business account

Before you consolidate your super, please consider if the timing is right and if you will lose access to benefits such as insurance or pension options, or if there are tax implications. While combining your super into a single account in one fund may mean you pay less in fees and have less paperwork to deal with, it will also mean that any insurance cover you have in your old fund will stop. You should check whether you have insurance cover in that fund and consider whether you need that cover before making a decision to combine your super. You should also consider where your future employer contributions will be paid. You should also compare the other features of your old fund with your Super Savings – Business account before making a decision. Visit australianretirementtrust.com.au/learn/education-hub/compare-super-funds

Do you have insurance cover with your other fund? You can transfer your cover to Australian Retirement Trust before you combine your super. Just complete a Transfer of Insurance Cover form, available on your employer plan's microsite. You should not cancel your existing cover until you have received confirmation that your transfer request has been accepted by Australian Retirement Trust.

Super fund name*	Member number*	Fund's Unique Superannuation Identifier or product name	Amount to transfer (tick one only)
			<input type="checkbox"/> Whole balance (default) <input type="checkbox"/> Partial amount of \$
			<input type="checkbox"/> Whole balance (default) <input type="checkbox"/> Partial amount of \$
			<input type="checkbox"/> Whole balance (default) <input type="checkbox"/> Partial amount of \$
			<input type="checkbox"/> Whole balance (default) <input type="checkbox"/> Partial amount of \$

4 Authorisation and declaration Please read the information below before signing

By signing this request form I am making the following statements to combine my super:

- I declare I have fully read this form and the information I have given is true and correct.
- I am aware I may ask my superannuation provider for information about the effect on my insurance cover or any other information about the effect this transfer may have on my benefits, and do not require any further information.
- I discharge the trustee of my previous superannuation fund from any further liability in respect to any amount once the benefit has been paid and transferred to Australian Retirement Trust.
- I understand Australian Retirement Trust may be required to deduct tax from any untaxed portion of the payment being transferred.

- I request any contributions received after payment of my benefit be transferred to Australian Retirement Trust.
- I consent to the information on this form being provided to my previous fund for the purposes of completing this transfer to Australian Retirement Trust.
- I request and authorise Australian Retirement Trust and the transferring fund(s) nominated above to arrange the total or partial (as specified above) balance transfer of my superannuation benefit to Australian Retirement Trust.
- I consent to my TFN being disclosed for the purpose of consolidating my accounts.
- I have considered where my employer super contributions (if any) are currently paid.

Important information

Your Privacy – Personal Information Collection Notice

The purpose for which we collect your information is to provide superannuation benefits, administer your benefits, and provide related services, information, and offers to you. This includes processing your application, managing your participation in Australian Retirement Trust, providing you with information about your benefits and our available services, and ensuring you receive your entitlements.

We will generally collect your personal information directly from you, your authorised representatives, your employer or other third parties, such as the Australian Taxation Office (ATO). If the information we request is not provided, we may be unable to properly administer your benefits and notify you about your entitlements.

We may disclose your personal information to entities within the Australian Retirement Trust Group, our service providers and advisers, medical and health professionals, regulators and government bodies, or to other third parties if we need to or if you have given consent to the disclosure. This includes but is not limited to the Fund's administration service provider, insurers, auditors and legal advisers. We also might be required by law to disclose information about you, for example to government bodies such as the ATO. We may also disclose information to third-party service providers in various countries, as described in our Privacy Policy.

For more information, please read our Privacy Policy which sets out the types of information we collect and how we collect, hold, use and disclose your personal information. Our Privacy Policy also describes how you can access information about your benefit and personal details, correct any information which is inaccurate or out-of-date, and information on our privacy complaints process. We are committed to respecting the privacy of personal information you give us. Our Privacy Policy may be updated from time to time and is available at australianretirementtrust.com.au/privacy or by contacting us.

Transfers from New Zealand

Australian Retirement Trust does not accept transfers from New Zealand KiwiSaver accounts or rollovers that contain a KiwiSaver component, from an Australian super fund.

Providing your tax file number (TFN)

Under the *Superannuation Industry (Supervision) Act 1993*, your superannuation fund is authorised to collect, use and disclose your tax file number.

The trustee of your superannuation fund may disclose your tax file number to another superannuation provider, when your benefits are being transferred, unless you request the trustee of your superannuation fund in writing that your tax file number not be disclosed to any other superannuation provider.

Declining to quote your tax file number to the trustee of your superannuation fund is not an offence. However giving your tax file number to your superannuation fund will have the following advantages:

- your superannuation fund will be able to accept all permitted types of contributions to your account/s,
- other than the tax that may ordinarily apply, you will not pay more tax than you need to - this affects both contributions to your superannuation and benefit payments when you start drawing down your superannuation benefits, and
- it will make it much easier to find different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

Member to sign here*



Date (DD/MM/YYYY)*

- Please tick if you're signing on behalf of a member aged under 15 or have a Power of Attorney. Please provide a certified copy of the Power of Attorney documentation or Guardianship papers.

Parent/guardian name

Parent/guardian signature



Please return the form to
Australian Retirement Trust via
australianretirementtrust.com.au/contact-us
OR Reply Paid 2924 Brisbane Qld 4001

We are committed to respecting the privacy of personal information you give us. If you would like a copy of Australian Retirement Trust's Privacy Policy, visit australianretirementtrust.com.au/privacy or call 13 11 84.

Australian Retirement Trust Pty Ltd ABN 88 010 720 840 AFSL No. 228975 Trustee of Australian Retirement Trust ABN 60 905 115 063