

Request to transfer whole balance of superannuation benefits between funds under the *Superannuation Industry (Supervision) Act 1993*

! Before you decide to consolidate you should read Colonial First State's booklet 'The easy way to consolidate your super'. This booklet includes the factors you should consider before transferring benefits between funds. You can obtain a copy of this booklet by calling 1300 654 666.

COMPLETING THIS FORM

- Read the important information pages
- Refer to instructions where indicated with a **➤**
- This form is only for whole (not part) balance transfers.

AFTER COMPLETING THIS FORM

- Sign the authorisation
- Send form and certified proof of identity documents to your **FROM** fund. (not to Colonial First State)

Personal details

Title: Mr Mrs Miss Ms Other

*Family name

*Given names

Other/previous names

*Date of birth Day / Month / Year

Tax file number

Under the *Superannuation Industry (Supervision) Act 1993*, you are not obliged to disclose your tax file number, but there may be tax consequences.

➤ See 'What happens if you do not quote your tax file number?' on pg 3 of Colonial First State's booklet 'The easy way to consolidate your super'.

*Gender Male Female

*Contact phone number

Residential address

*Address

*Suburb

*State/territory *Postcode

Previous address

➤ If you know that the address held by your **FROM** fund is different to your current residential address, please give details below.

Address

Suburb

State/territory Postcode

Fund details

FROM

*Fund name

Fund phone number

Membership or account number

Australian business number (ABN)

Superannuation Product Identification Number (SPIN)

! If you have multiple account numbers with this fund, you must complete a separate form for each account you wish to transfer.

TO

Fund name

Fund phone number

*Membership or account number

Australian business number (ABN)

Superannuation Product Identification Number (SPIN)

! You must check with your **TO** fund to ensure they can accept this transfer.

Proof of identity **➤** Check with your **FROM** fund whether proof of identity is required. See page 6 of Colonial First State's booklet 'The easy way to consolidate your super'.

I have attached a certified copy of my driver's licence or passport

OR

I have attached certified copies of both:

Birth/Citizenship Certificate or Centrelink Pension Card

AND

Centrelink payment letter or Government or local council notice (<1 year old) with name and address

Authorisation

By signing this request form I am making the following statements:

- I declare I have fully read this form and the information completed is true and correct
- I am aware I may ask my superannuation provider for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits, and do not require any further information.
- If the **TO** fund is a self managed superannuation fund (SMSF), I confirm that I am a member, trustee or director of a corporate trustee of the SMSF.
- I discharge the superannuation provider of my **FROM** fund of all further liability in respect of the benefits paid and transferred to my **TO** fund.

I request and consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect to this transfer.

*Name (Print in BLOCK LETTERS)

*Signature

*Date Day / Month / Year

* Denotes mandatory field. If you do not complete all of the mandatory fields, there may be a delay in processing your request.

IN-CONFIDENCE – when completed



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To whom it may concern

FirstChoice Employer Super compliance advice

FirstChoice Employer Super is part of the Colonial First State – FirstChoice Superannuation Trust ('fund'). The fund is a complying, resident, regulated superannuation fund and is constituted under a trust deed dated 29 April 1998. The trustee of the fund is Colonial First State Investments Limited ('the trustee').

In the event that the fund's complying status was revoked the trustee would receive notice to that effect under section 63 of the Superannuation Industry (Supervision) Act. The trustee confirms that it has not received nor does it expect to receive any such notice.

Yours faithfully

A handwritten signature in black ink, appearing to read "Nigel McCammon", written in a cursive style.

Nigel McCammon

General Manager, Client Services

For and on behalf of the trustee, Colonial First State Investments Limited