



Consolidate your superannuation benefits

Transferring to the Plum Super

Combining your super into one account can help reduce fees and paperwork, making it easier to monitor your super investment.

Did you know that you have access to telephone-based financial advisers who can provide you with advice on a range of topics including consolidating your super? Contact us on **1300 55 7586** to find out more.

Two easy steps to consolidate your super

Step 1 – Complete the Consolidate your superannuation benefits form attached. If you want to consolidate more than one fund into your Plum Super account, please photocopy this form or download it from plum.com.au

Step 2 – Post your completed Consolidate your superannuation benefits form to Plum Super and we'll forward it to the other fund on your behalf. The other fund is bound to transfer your money to your Plum Super account within 3 days, providing all the information you provide is complete and correct.

Note: If you don't hear from us confirming your transfer, please contact us or your other fund to check on its progress.

What are the benefits of consolidating your super?

You'll pay just one set of fees – having more than one super account generally means that you're paying more than one set of fees. You could be paying fees for additional super accounts that you don't really need.

Less paperwork – having one account also means you'll only receive one set of super paperwork which can make it easier for you. Not only will you be doing your bit for the environment, but you'll be able to keep a closer eye on where your super is heading.

It can help you get active with your super – having your super all in the one place can empower you to get more engaged and give you a better view of your entire retirement savings. For example, you can choose an investment strategy for all of your super, not just different parts of it.

After completing the form, make sure you:

- sign and date it; and
- Send your completed request to:
Plum Super,
GPO Box 63, Melbourne VIC 3001

Things you need to consider when transferring your super to Plum Super

When you transfer all or part of your super, your entitlements under the other fund may cease. You need to consider all relevant information before you make a decision to transfer your superannuation. If you or Plum Super asks for information, your other super fund should be able to provide it.

Two points you may wish to consider are:

Fees – your other fund must give you information about any administration, exit, buy/sell spreads or withdrawal fees. If you are not sure of the fees that may apply, you should contact the other fund for further information before deciding whether to consolidate your super.

Death and disability benefits – your other fund may insure you against death, illness or accident. This entitlement may cease when you consolidate your super into your Plum Super account.

Note: Completing this form will not change the fund to which your employer pays your contributions. To nominate Plum Super as your primary fund, please complete the Standard choice form available for download from the ATO website ato.gov.au and return it to your payroll office or HR department.



If you have more than one account, please copy this form (or download a blank form from plum.com.au) to provide us the details of each fund.

STEP 1 Complete your personal details (please use BLOCK letters)

Member number (if applicable)

Surname (family name)

Given names

Title

Mr Mrs Miss Ms Other

Date of birth (DD/MM/YYYY)

Gender (please tick)

Male Female

Residential address

Postcode

Country

Previous address – Please include this if you know the address held by your other fund is different to your current address.

Postcode

Country

Business phone

Home phone

Mobile

Email

Tax file number (TFN)

Under the Superannuation Industry (Supervision) Act 1993, your super fund is authorised to collect your TFN, which will only be used for lawful purposes. Your TFN will be used for identification purposes and will be disclosed to your other super provider, unless you request in writing that it is not disclosed. If your other super fund is unable to identify you they may request additional information.

STEP 2 Details of other superannuation fund**Transfer from**

Fund name

Membership or account number

Phone number of other superannuation fund or company

Address of other superannuation fund or company

Postcode

Country

Australian Business Number (ABN)

Unique superannuation identifier (USI)

Electronic Service Address (ESA) - (mandatory for SMSF transfers only)

How much would you like to transfer from the other fund? My total account balance OR A partial amount \$ **Transfer to**

Fund name

Product name

Fund address

Fund phone number

Australian Business Number (ABN)

Unique superannuation identifier (USI)

STEP 3 Member authorisation and privacy disclosure statement

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

- I declare I have read this form and the information completed is true and correct;
- I am aware I may ask the other superannuation fund for information about any fees or charges (including exit fees and buy/sell spreads) that may apply, or any other information about the effect this transfer may have on my benefits, and do not require any further information (including when I'm consolidating accounts within the MLC Super Fund);
- I consent to my tax file number being disclosed for the purposes of consolidating my account;
- I discharge the trustee of the other super fund of all further liability in respect of the benefits paid and transferred to Plum Super;
- I authorise the trustee of the other super fund to provide the Trustee with all relevant details of my membership, a copy of my rollover benefit statement and any other information required by law to affect this transfer;
- I understand that by transferring the other fund to my Plum Super account I may lose the insurance benefits of the other

- super fund (including when I'm consolidating accounts within the MLC Super Fund);
- I understand I am requesting the closure, or partial withdrawal of benefits from my other super fund (including where I am consolidating accounts within the MLC Super Fund);
- I request and consent to the transfer of my super as described above and authorise the super provider of each fund to give effect to this transfer.

Privacy disclosure statement

The Trustee considers all information about our members to be private and confidential, and we hold ourselves to the highest standards in the safe-keeping and use of that information. The information collected on this form will only be used to assist you to consolidate your superannuation. The Fund's service providers are also bound by obligations of confidentiality.

To view our privacy policy or if you have any questions regarding the way your personal information is handled by us, please refer to plum.com.au or contact us on **1300 55 7586**.

Your full name (Print in BLOCK LETTERS)

Signature

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|---|-------------------|--|--|--|--|--|--|
| X | Date (DD/MM/YYYY) | | | | | | |
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Please return this completed form to:

Plum Super, GPO Box 63, Melbourne VIC 3001