

# Roll over to Maritime Super

Complete this form to transfer your benefit from another super fund, Retirement Savings Account, approved deposit fund or deferred annuity to Maritime Super. Please read the Important Notes overleaf before completing this form



Return this completed form to:

**BY FAX**

(02) 9261 3683

**BY POST**

Maritime Super  
Locked Bag 2001  
QVB Post Office NSW 1230

## Your personal details

Member Number  Surname  Given names

Residential address

Postal address (if different from above)

Date of birth  /  /  Daytime phone number/Mobile number  Email address

Your tax file number:           Read the Important Notes to learn more about providing your tax file number

Tick this box to consent:

I consent to Maritime Super conducting a search of ATO records for lost or unclaimed super or other super accounts I may have with other funds, now and in the future, as permitted under *Superannuation Industry (Supervision) Act 1993* and Regulations.

Please note that if we already have your TFN and you want Maritime Super to conduct a search on your behalf, you can tick the box or provide your consent to us in writing.

## Provide details about the super you'd like to roll into your Maritime Super account

### FROM (transferring fund)

Fund name<sup>^</sup>

Fund phone number<sup>^</sup> (required for SMSF transfers)

Address

Australian Business Number (ABN)

Unique Super Identifier<sup>^</sup>

Membership number<sup>^</sup> (not required for SMSF transfers)

How much of your benefit do you wish to transfer?  
 All of my benefits OR The amount of \$

### TO (receiving fund)

Fund name<sup>^</sup>

Fund phone number

Address

Australian Business Number (ABN)

Unique Super Identifier

Superannuation Product Identification Number (SPIN)



Note: fields marked with <sup>^</sup> must be completed - otherwise, there may be a delay in processing your request.

## Member's declaration

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

- I have fully read this form and the information overleaf, and the information provided on this form is true and correct.
- I am aware that I may ask my FROM super fund for information about any fees or charges that may apply and other information about the effect this transfer may have on my benefits, and have obtained and/or do not require any further information.
- I consent to my tax file number being disclosed for the purpose of consolidating my super.
- I authorise Maritime Super and its Administrator to access information about the FROM super fund from its trustee/administrator and request they advise both myself and Maritime Super in the event the transfer request can't be processed, additional information is required or it's delayed for any reason.
- I agree to release and discharge the provider of my FROM super fund of all further liability in respect of benefits transferred to Maritime Super.
- I request and consent to the transfer of super as described above and authorise the super provider of each fund to give effect to this transfer.

Signature

Date

## Important notes

### Things to consider before transferring your benefit

When you transfer your super, your entitlements under that fund may stop – therefore, you need to consider all relevant information before you decided to transfer your super. If you ask for information, your super provider must give it to you.

Some things you should consider are:

- ▶ **fees** – your FROM super fund must give you information about any exit or withdrawal fees if you request this information. If you're unsure about the fees that may apply, contact your other fund for more information before completing this form. The fees could include administration fees and exit or withdrawal fees. Maritime Super will not charge you any fees for transferring the amount to your Maritime Super membership. Differences in fees that funds charge can have a significant effect on the super you will have to retire on – for example, a 1% increase in fees may significantly reduce your final benefit.
- ▶ **death and disability benefits** – your FROM super fund may insure you against death, illness or any accident which leaves you unable to return to work. If you transfer your benefits from this fund, your insurance cover may be cancelled. Ask your FROM super fund and, if you will require additional insurance, call Member Services on 1800 757 607 to discuss the insurance benefits offered through Maritime Super. If the benefits provided through Maritime Super do not meet your insurance needs, we suggest that you speak with a financial planner before transferring your benefit.
- ▶ **transferring your insurance cover** – if you have Death and/or Total and Permanent Disablement insurance cover with your FROM super fund, you may be able to transfer your cover to Maritime Super without the need to be underwritten by the Insurer. Call Member Services on to learn more.
- ▶ **employer contributions** – if an employer contributes to your FROM super fund, this form will not redirect any future contributions to Maritime Super. If you are eligible for Choice of fund, you will need to complete a *Standard Choice form* (available from [www.ato.gov.au](http://www.ato.gov.au) or by calling the ATO on 13 10 20) and give this to your employer to direct future employer contributions to Maritime Super. If you're eligible for Choice of fund, speak with your payroll office to find out whether your employer can contribute to Maritime Super for you.

### Providing your tax file number

Under the *Superannuation Industry (Supervision) Act 1993*, Maritime Super is authorised to collect your TFN which we will treat as confidential and will only use for lawful purposes. These purposes may change in the future due to legislative change. We may disclose your TFN to another super provider when your benefits are being transferred, unless you request Maritime Super in writing not to. It is not an offence not to quote your TFN.

Giving your TFN to Maritime Super will have the following advantages (which may not otherwise apply):

- we can accept all types of contributions to your account and you won't pay extra tax on contributions
- no additional tax will be deducted when you start drawing down your super benefits
- with your consent, we can search the ATO's SuperMatch system from time to time to find your lost super held by the ATO or super you have with other funds - we will notify you of any super found and offer to consolidate your benefit into Maritime Super; and
- it will be much easier to trace different super accounts in your name so that you receive all your super benefits when you retire.

If you do not provide your tax file number, the transferring fund may ask you to provide proof of identity.

### Tax deductions for personal contributions

Generally, only self-employed and substantially self-employed people (i.e. those with less than 10% of their total income derived from employment) are entitled to a tax deduction for personal contributions to super.

If you think you may be entitled to a tax deduction for any contributions you have made in this (or the previous) financial year, contact your FROM super fund and complete their forms to claim a tax deduction. You must do this before returning this form to Maritime Super.

### If you have changed your name or you are signing on behalf of another person

If you have changed your name (from what your transferring super fund has on record for you) or you are signing on behalf of the applicant, you will need to provide a 'linking document' – this is a document that proves a relationship exists between two (or more) names or people.

A linking document must be certified as a true copy by any individual authorised to do so - refer to the *Providing proof of identity fact sheet* on our website to learn more (or call Member Services for a hardcopy).

Suitable linking documents include:

- marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office; or
- guardianship papers or Power of Attorney (if you are signing on behalf of the applicant)