

**Everything you need  
to roll your super into  
HOSTPLUS and save**

1 November 2009



**Super rollover**

# Get your super working together as one

If you've been with different employers at different times, you're likely to have super spread among many different funds. Roll it all into **HOSTPLUS** however, and you can get your super working smarter. Together.

## You minimise fees

Having your super in more than one fund may mean you're paying more than one set of fees. But having it all with **HOSTPLUS** means you pay one, low member fee of \$1.50 per week. Like most super funds, investment expenses also apply.

## You minimise paperwork

By keeping your super together in one fund, there's only one account to manage. Plus there's just one, convenient point of contact for all your super needs.

## You share in the profits

**HOSTPLUS** is a fund run only to profit members, so after taxes and investment expenses are subtracted, we reinvest all profits back into the fund for you and other members.

## Remember, **HOSTPLUS** can also go where you go

If you change jobs, you can take your **HOSTPLUS** membership with you. So there's no need to switch to another fund, even if you move interstate or to a completely different industry.

## Consolidate your super in three simple steps

We'll take care of everything. Once we receive your form, we will contact your old fund or funds and arrange for your money to be deposited into your **HOSTPLUS** account.

- *Step 1 Find out where your super is.*

You'll need the name and membership number of your old super fund. If you can't find statements of your fund, call your old employer who can tell you where your super was paid. If they can't, you can use SuperSeeker at [www.ato.gov.au/super](http://www.ato.gov.au/super) to search for your missing super or call 13 10 20.

- *Step 2 Read and complete the attached form.*

First, you'll need to read the attached information. Then complete one form for each fund you wish to roll over. Simply photocopy the form, download at [hostplus.com.au](http://hostplus.com.au) or call **1300 HOSTPLUS (1300 467 875)** if you require extra copies. Before cancelling your existing arrangements, you should check to see if there are any exit fees or penalties and whether cancellation will affect any related insurance cover.

- *Step 3 Return by mail.*

Once your forms are complete, simply place them in an envelope and mail to: **HOSTPLUS**, Reply Paid 84069, Carlton South VIC 3053.

## We're here to help

Naturally, if you have any questions, simply contact **HOSTPLUS** and we'll be happy to help. Just call **1300 HOSTPLUS (1300 467 875)**, 8am–8pm, Monday to Friday or visit [hostplus.com.au](http://hostplus.com.au)

# Rolling your entire account balance into HOSTPLUS



By completing this form, you're requesting the transfer of the WHOLE balance of your superannuation benefits to HOSTPLUS. This form CANNOT be used to transfer part of the balance of your superannuation benefits. This form will NOT change the fund to which your employer pays your contributions. The standard choice form must be used by you to change funds.

## How to roll over

### Before completing this form

Please ensure you read the important information below.

### When completing this form

- Refer to these instructions where a question shows a message like this:
- Print clearly in BLOCK LETTERS.

### After completing this form

- Sign the authorisation
- Attach the appropriately certified proof of identity documents
- Review the checklist below
- Send the request form to HOSTPLUS.

### Checklist

- Have you read all the information?
- Have you considered where your future employer contributions will be paid?
- Have you completed all of the mandatory fields on this form?
- Have you signed and dated this form?
- Have you attached the certified documentation including any linking documents if applicable?

## More information

- This transfer may close your account (you will need to check this with your FROM fund).

### This form CANNOT be used to:

- transfer part of the balance of your superannuation benefits – if you'd like to roll part of your account into HOSTPLUS, use the *Rolling part of your account balance into HOSTPLUS* form
- transfer benefits if you don't know where your superannuation is
- transfer benefits from multiple funds on this one form – a separate form must be completed for each fund you wish to transfer superannuation from
- change the fund to which your employer pays contributions on your behalf
- open a superannuation account, or
- transfer benefits under certain conditions or circumstances, for example if there is a superannuation agreement under the Family Law Act 1975 in place.

### What happens to my future employer contributions?

Using this form to transfer your benefits will not change the fund to which your employer pays your contributions and may close the account you are transferring your benefits FROM.

If you wish to change the fund into which your contributions are being paid, you will need to speak to your employer about Super Choice. For the appropriate forms and information about whether you are eligible to choose the fund to which your employer contributions are made, visit [www.superchoice.gov.au](http://www.superchoice.gov.au) or call the Australian Taxation Office on 13 10 20.

### Things you need to consider when transferring your superannuation

When you transfer your superannuation, your entitlements under that fund may cease. You need to consider all relevant information before you make a decision to transfer your superannuation. If you ask for information, your superannuation provider must give it to you. Some of the points you may consider are:

- **Fees** – your FROM fund must give you information about any exit or withdrawal fees. If you are not aware of the fees that may apply, you should contact your fund for further information before completing this form. The fees could include administration fees as well as exit or withdrawal fees. The differences in fees that different funds charge can have a significant effect on what 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 fund may insure you against death, illness or an accident which leaves you unable to return to work. If you choose to leave your current fund, you may lose any insurance entitlements you have. HOSTPLUS may not offer the same insurance so it's important that you check the costs and amount of cover offered.

### What happens if I do not quote my Tax File Number (TFN)?

If you do not provide your TFN, contributions made to your account may be taxed at the highest marginal tax rate plus the Medicare levy, compared to the concessional tax rate of 15%. HOSTPLUS may deduct this additional tax from your account.

If we do not have your TFN, you will not be able to make personal contributions to your HOSTPLUS account. Choosing to quote your TFN will also make it easier to keep track of your superannuation in the future.

Under the Superannuation Industry (Supervision) Act 1993, HOSTPLUS is authorised to collect your TFN, which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change. The TFN may be disclosed to another superannuation provider, when your benefits are being transferred, unless you request in writing that your TFN is not to be disclosed to any other trustee.

# Completing proof of identity

You will need to provide documentation with this transfer request to prove you are the person to whom these superannuation entitlements belong.

## Acceptable documents

You can provide proof of identity in one of the following ways:

- 1 By providing one of the following documents only:
  - driver's licence issued under State or Territory law
  - passport

OR

- 2 By providing one document from both Group A and Group B

### Group A

- birth certificate or birth extract
- citizenship certificate issued by the Commonwealth
- pension card issued by Centrelink that entitles you to financial benefits

### Group B

- letter from Centrelink regarding a Government assistance payment
- notice issued by Commonwealth, State or Territory Government or local council within the past 12 months that contains your name and residential address.

For example:

- Tax Office Notice of Assessment
- rates notice from local council.

## Have you changed your name or are you signing on behalf of another person?

If you have changed your name or are signing on behalf of the applicant, you will need to provide a certified linking document. A linking document is a document that proves a relationship exists between two (or more) names.

The following table contains information about suitable linking documents.

Purpose	Suitable linking documents
Change of name	Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office.
Signed on behalf of the applicant	Guardianship papers or Power of Attorney.

## Verifying your identity

Under the anti-money laundering and counter-terrorism financing laws, you're required to provide evidence that verifies your full name, date of birth and residential address before you can withdraw your benefit.

## How to certify documents

### Step 1

Make a copy of the original document/s. All copies must be clear and legible before certifying.

### Step 2

Take the original identification document and a photocopy of both sides of the original document to an authorised person. We are unable to accept certification on the reverse side of the photocopied document.

#### The authorised person must:

- Write in English on the photocopies: 'This is a true and correct copy of the original.'
- Write their name, address, occupation, business hours telephone number and registration number (if applicable) and sign each photocopy.

## Who can certify documents

- chiropractor
- dentist
- nurse
- registered medical practitioner
- pharmacist
- psychologist
- veterinary surgeon
- legal practitioner, who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia
- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
- bank officer with 2 or more continuous years of service
- chief executive officer of a Commonwealth court
- finance company officer with 2 or more years of continuous service
- judge of a court
- Justice of the Peace
- magistrate
- member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants
- minister of religion
- notary public
- officer with, or authorised representative of, a holder of an Australian financial services licence, having 2 or more years of continuous service with one or more licensees
- permanent employee of the Australian Postal Corporation with 2 or more years of continuous service who is employed in an office supplying postal services to the public
- police officer
- Registrar, or Deputy Registrar, of a court
- teacher employed on a full-time basis at a school or tertiary education institution.

## Where do I send the form?

You can send your completed and signed form with your certified proof of identity documents to:

**HOSTPLUS**  
Reply Paid 84069  
Carlton South VIC 3053

## Your privacy

The information requested on this form is required in order for us to carry out your instructions to roll over your superannuation to us. We will provide this information to our Administrator and to your old fund. If you do not provide us with this information we may not be able to carry out your rollover instructions.

Your personal information will not be used or disclosed for any other purpose without your consent, except where required by law. You are able to gain access to this information by calling **1300 HOSTPLUS (1300 467 875)**, 8am–8pm, Monday to Friday. Alternatively, you can email [info@mail.hostplus.com.au](mailto:info@mail.hostplus.com.au) with your request.

## How long will it take?

Generally funds process rollover and transfer requests within 30 days of you providing all necessary information. We are reliant on receiving information from the fund you are exiting from to finalise your request within the time limit. If the required information is not received within 30 days from your exiting fund, we will notify you.

# Request to transfer your entire account balance into HOSTPLUS



## 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: HOSTPLUS, Reply Paid 84069, Carlton South VIC 3053

OFFICE USE ONLY

## Step 1 Personal details

Please tick appropriate box

Mr  Mrs  Miss  Ms  Other

Please specify

\*Mandatory Fields

\*Given name(s)

\*Surname

Email address

My Tax File Number is:

\*Contact phone number

\*Date of birth

 /  / 

▶ See 'What happens if I do not quote my 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.

## Step 2 Residential details

Address

Suburb

State

Postcode

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

Previous address

Suburb

State

Postcode

## Step 3 Fund details

Where are you rolling from?

\*Fund name

Membership or account number

Fund Australian Business Number (ABN)

Fund phone number

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.

Where are you rolling to?

\*Fund name

\*Membership or account number

Fund Australian Business Number (ABN)

\*Fund phone number

Superannuation Product Identification Number



HOSTPLUS does not recommend that any member, employer or employee make decisions concerning superannuation arrangements based solely on the information in this publication. This information is of a general nature. It has been prepared without taking into account your particular objectives, circumstances, financial situation or needs. When considering your own objectives you will also need to consider, with the help of a licensed financial planner, whether the advice is appropriate in light of your particular needs, objectives and financial circumstances. This information is also not intended to be, and should not be construed in any way as investment, legal or financial advice. Issued by Host-Plus Pty Limited ABN 79 008 634 704, AFSL No. 244392, RSEL No. L0000093, RSE No. R1000054.