

Request to transfer benefits to Aware Super



ABN 53 226 460 365, Unique Superannuation Identifier (USI) 53 226 460 365 001

You should use this form if you would like Aware Super to contact your other fund (the FROM fund) to transfer all or part of your superannuation from the other fund to Aware Super. Complete a separate form for each other fund.

Please use a dark pen and CAPITAL letters, or type directly into this form online, print and sign it and send it to us. Use (X) to mark boxes. All forms are on our website at aware.com.au/forms.

If you have any questions, please call us on 1300 650 873.

1. Your personal details

Member number*	Account number	Date of birth (DD-MM-YYYY)
<input type="text"/>	F S S U <input type="text"/>	<input type="text"/>

* If you are not a member of Aware Super, you will have to join the fund before we can accept your transfer request. You can join online via our website or by completing the application form at the back of the Member Booklet for personal members.

Title	Last name
<input type="text"/>	<input type="text"/>

Given name(s)
<input type="text"/>

Residential address
<input type="text"/>

Suburb	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

Daytime contact number	Mobile number
<input type="text"/>	<input type="text"/>

Tax file number (please read the tax file number information on page 2 before providing your TFN)
<input type="text"/>

Email (for security reasons, please ensure that your nominated email address is your personal email address and not a role-based email address such as employee_title@company.com.au)
<input type="text"/>

IMPORTANT!
It isn't compulsory to provide your TFN but if you don't, the fund you are transferring from may ask you to personally identify yourself before they will transfer your benefit.

IMPORTANT!
Please ensure that you include your FROM fund's name, ABN, Unique Superannuation Identifier and your member number with them or we may not be able to process your request.

CONSOLIDATE ONLINE
You can also consolidate your super accounts online without having to complete any paperwork. Go to our website at aware.com.au/combine.

2. Details of the fund you are transferring from

Name of the other fund (your FROM fund)
<input type="text"/>

Address of other fund
<input type="text"/>

Suburb	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

Fund ABN	Unique Superannuation Identifier (USI)
<input type="text"/>	<input type="text"/>

Member number (in your FROM fund)	Contact number
<input type="text"/>	<input type="text"/>

Transfer my whole benefit; or
 Transfer the following part of my benefit: \$, , .

Things to check before you transfer

- Ask your FROM fund about any fees or charges that apply on transfer, or any other impact this transfer may have on your benefit.
- If you are transferring only **part** of your benefit, your FROM fund will have rules for withdrawing from preservation components and investment options. Ask your FROM fund about your partial withdrawal choices and options.
- If you have insurance through your FROM fund, it won't be transferred automatically but you can apply to transfer this cover to your Aware Super superannuation account before you transfer your benefit.



IMPORTANT!
 If you are currently invested in the MySuper Life Cycle strategy and you choose to invest the amount transferred in a Choice strategy, you will no longer be a MySuper Life Cycle member and your balance will not be automatically switched to the Balanced Growth option at age 60. However, you can switch back to the MySuper Life Cycle option at any time.

3. Investment choice for your transferred funds

You can choose how you would like your transferred funds invested. If you don't make a choice, your transferred funds will be invested in the same way as your current super contributions.

- CURRENT CONTRIBUTION STRATEGY**
 If you choose your CURRENT CONTRIBUTION STRATEGY, do not fill in any of the CHOICE STRATEGY boxes below.
- CHOICE STRATEGY**
 Please choose one or more of the investment options shown below by recording the percentage next to your chosen option(s). You can only nominate in **whole percentages** and your total choices **must add up to 100%**.

Pre-mixed	Percentage	Single asset class	Percentage
High Growth	<input type="text"/> <input type="text"/> <input type="text"/> %	Australian Equities	<input type="text"/> <input type="text"/> <input type="text"/> %
Growth	<input type="text"/> <input type="text"/> <input type="text"/> %	Australian Equities SRI	<input type="text"/> <input type="text"/> <input type="text"/> %
Diversified SRI	<input type="text"/> <input type="text"/> <input type="text"/> %	International Equities	<input type="text"/> <input type="text"/> <input type="text"/> %
Balanced Growth	<input type="text"/> <input type="text"/> <input type="text"/> %	Property	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative Growth	<input type="text"/> <input type="text"/> <input type="text"/> %	Australian Fixed Interest	<input type="text"/> <input type="text"/> <input type="text"/> %
		International Fixed Interest	<input type="text"/> <input type="text"/> <input type="text"/> %
		Cash	<input type="text"/> <input type="text"/> <input type="text"/> %

4. Privacy

The personal information provided on this form is collected by and held for Aware Super by the fund administrator, Mercer Administration, in accordance with the Australian Privacy Principles of the *Privacy Act 1988 (Cth)*, for the purpose of administering accounts and providing services associated with fund membership. For further information about how personal information is handled, please call us on **1300 650 873** or visit aware.com.au/privacy to view the privacy policy (a hard copy of the policy may also be provided on request). The policy contains information about access to and correction of personal information, how a complaint can be made about a privacy breach and other important information about how personal information is collected, used and disclosed.

IMPORTANT!
 If your employer is paying contributions to your FROM fund, you may be able to arrange for these to be paid to Aware Super. Speak to your employer or call the Australian Tax Office on 13 10 20 for more information.


5. Declaration

- I request and consent to the transfer of superannuation as described on this form to **Aware Super (ABN 53 226 460 365, Unique Superannuation Identifier (USI) 53 226 460 365 001)** and authorise the FROM fund to give effect to this transfer.
- I understand that the *Member Booklet Supplement: Investments* contains a description of Aware Super's investment options and I accept responsibility for my choice of investment option(s) and acknowledge that the trustee is not liable for any loss from a choice I have made.
- I discharge the superannuation provider of my FROM fund from all further liability in respect of the benefits paid and transferred to Aware Super.
- I authorise Aware Super and its administrator to request and receive information from the FROM fund.
- I have read and understand the Aware Super privacy policy.

 Please sign and date form here.

Member signature

Date signed (DD-MM-YYYY)

 Send the form to this address.

6. Where to send your completed form

Return the completed form to **Aware Super PO Box 1229 WOLLONGONG NSW 2500**. If you have any questions, please call us on **1300 650 873**.

About your tax file number
 Under the Superannuation Industry (Supervision) Act 1993, the trustee is authorised to collect, use and disclose your TFN. The trustee may disclose your TFN to another superannuation provider when your benefits are being transferred, unless you write to your super fund and ask the trustee not to disclose your TFN to any other trustee. It is not compulsory to provide your TFN but if you don't, you may pay additional tax on your contributions and benefit payments, and some contributions may not be accepted. If you do not provide your TFN and the fund you are transferring from cannot verify your details with the Australian Tax Office, then you may be required to provide proof of identity to the fund you are transferring from.