

Consolidate With QSuper

When to use this form

Complete this form if you have another superannuation account (including an SMSF) and would like to transfer part or all of the money from that account into your QSuper Accumulation account. If you want to transfer from more than one account, please complete section 2 in full.

If you would prefer to do this online, you can combine your other super money into QSuper through Member Online at memberonline.qsuper.qld.gov.au or search for your other super at my.gov.au

If you currently only have a QSuper Income account and/or Lifetime Pension, you will need to open a QSuper Accumulation account and combine your super into that account. Then you can either restart your Income account or open a new Lifetime Pension using that money. Please see the Product Disclosure Statement for Income Account and Lifetime Pension for more information.

You can't use the form to transfer an overseas pension fund to Australia. For information about your options, please see our Transfer of Overseas Pension Funds factsheet available at qsuper.qld.gov.au/factsheets or call us to request a copy.

For more information about how to transfer your super to QSuper, read Consolidating Your Super With QSuper at qsuper.qld.gov.au/factsheets or call us on 1300 360 750.

Please complete in **BLOCK** letters, in blue or black ink.

1 Personal details

Client number

You can find your client number on your annual statement or by logging in to Member Online.

Title

First name/s

Last name

Previous name¹ (if we know you by another name)

Date of birth (dd/mm/yyyy)

 / /

Home phone number

Mobile phone number

Work phone number

Email address

Residential address

State

Postcode

Postal address

As above

State

Postcode

¹ If your name has changed and you work for the Queensland Government or a default employer, let your payroll office know and they'll then let us know. Otherwise, please send us a certified copy of either a marriage certificate or other legal change of name document.



Part of Australian Retirement Trust

2 Details of your other super fund/s and amount you want to transfer (mandatory)



If your name is listed differently at your other super fund, you'll need to contact them to update your details before you send this form to us.

If you are closing your other super account, make sure:

1. You have already asked your employer to pay your future super contributions to QSuper – see qsuper.qld.gov.au/changingjobs
2. You think about whether it's right for you. You may lose access to benefits such as insurance or pension options, and you need to consider tax implications.

Name of other fund 1

ABN of other fund²

Unique Superannuation Identifier (USI) of other fund² (N/A for SMSF)

Electronic service address (ESA)³ (mandatory for SMSF)

Phone number of other fund

Your membership account number with other fund

My full balance

⋮
OR
⋮

Partial amount you want to transfer
(dollars and cents - do not round up or down)

\$

Name of other fund 2

ABN of other fund²

Unique Superannuation Identifier (USI) of other fund² (N/A for SMSF)

Electronic service address (ESA)³ (mandatory for SMSF)

Phone number of other fund

Your membership account number with other fund

My full balance

⋮
OR
⋮

Partial amount you want to transfer
(dollars and cents - do not round up or down)

\$

Name of other fund 3

ABN of other fund²

Unique Superannuation Identifier (USI) of other fund² (N/A for SMSF)

Electronic service address (ESA)³ (mandatory for SMSF)

Phone number of other fund

Your membership account number with other fund

My full balance

⋮
OR
⋮

Partial amount you want to transfer
(dollars and cents - do not round up or down)

\$

Need help?

You can call us on 1300 360 750 if you'd like help with completing this form.

² Please check your other super fund's website or contact them to find out their ABN and Unique Superannuation Identifier (USI). USI does not apply for an SMSF.

³ You need an electronic service address (ESA) for your SMSF provider to send us your data. Please contact your SMSF provider for the ESA. This is only required for an SMSF.

Name of other fund 4**ABN of other fund⁴****Unique Superannuation Identifier (USI) of other fund⁴
(N/A for SMSF)****Electronic service address (ESA)⁵ (mandatory for SMSF)****Phone number of other fund****Your membership account number with other fund** **My full balance**:
OR
: **Partial amount you want to transfer**

(dollars and cents - do not round up or down)

\$

If you have other super funds you want to transfer to QSuper, please provide these details on a separate sheet of paper and attach it to the back of this form.

How your funds will be invested

Your transfer will be invested according to your current investment preferences strategy. You can check your current investment options in Member Online at **memberonline.qsuper.qld.gov.au** under 'Investments' then 'Your investments', by checking your annual statement, or by calling us.

3 Declaration and authorisation

- I know I can contact my other super fund to find out if transferring this money will affect my benefits with them. By signing this form, I am letting you know that I have either received this information from them, or I do not need any more information.
- I am the person named on this form, or have a power of attorney to act on the member's behalf.⁶
- I want the Australian Retirement Trust to arrange the transfer of my money from my other super fund to my QSuper Accumulation account.
- Once payment is made to my QSuper account, if I've selected to transfer my full balance from the other super fund, I understand this will close my account with that super fund.
- I have notified my employer (if relevant) to pay any future contributions to my QSuper account.
- I understand my other fund/s may contact me to ask for documents to satisfy their proof of identity requirements.
- I understand that my transfer will be invested according to my current investment strategy.
- I declare all information provided in this form is true and correct.

Name**Signature****Date signed (dd/mm/yyyy)** / /

⁴ Please check your other super fund's website or contact them to find out their ABN and Unique Superannuation Identifier (USI). USI does not apply for an SMSF.

⁵ You need an electronic service address (ESA) for your SMSF provider to send us your data. Please contact your SMSF provider for the ESA. This is only required for an SMSF.

⁶ If you're signing as a power of attorney and you haven't already given us a certified copy of your power of attorney documentation, please attach it to this form.

For more information

If you want to learn more about your super we can help.



Calculators at qsuper.qld.gov.au/calculators

Try our educational calculators to learn more about your insurance, investments, how to maximise your super, and retirement planning.



Call us on **1300 360 750**

Our Member Services team will be happy to discuss your account with you.



Advice

Deciding what is best for you will depend on your personal circumstances and you may want to seek personal financial advice to get the most from your superannuation. You can find out more about financial advice options at qsuper.qld.gov.au/advice

If you have not previously provided your Tax File Number (TFN) and wish to supply this, please update via Member Online or by completing the Tax File Number notification form available on our website. To protect your privacy, please do not write your TFN on this form.

Member Centres

Visit qsuper.qld.gov.au/membercentres for locations

Member Services team

Phone 1300 360 750
Overseas +617 3516 1009
 Monday to Friday 8.00am – 6.00pm (AEST)

Postal address GPO Box 200, Brisbane QLD 4001
Email qsuper@qsuper.qld.gov.au
Fax 1300 242 070
Website qsuper.qld.gov.au

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