‘rollover information’ Request to Transfer Whole Balance of Superannuation Benefits between Funds

By completing this request you will initiate a rollover request to transfer the whole balance of your super benefits between funds. This form cannot be used to transfer part of the balance of your super benefits, and you cannot use this form to transfer your benefits to your own self-managed super fund (SMSF).

This form will not change the fund to which your employer pays your contributions. The Standard Choice form must be used for this purpose.

Before completing your rollover request

- Read the important information below.

Important 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 super benefits
- change the fund to which your employer pays contributions on your behalf
- open a super account, or
- transfer benefits under certain conditions or circumstances – for example if there is a super agreement under the Family Law Act 1975 in place.

What happens to my future employer contributions?

Using this form will not change the fund to which your employer pays your contributions.

If you wish to change the fund into which employer contributions are being paid, you will need to complete a Standard Choice form.

For the appropriate information and forms about whether you are eligible to choose the fund to which your employer contributions are made, visit ato.gov.au or call the Australian Taxation Office (ATO) on 13 10 20.

Things you need to consider when transferring your superannuation

When you transfer your super, your entitlements under that fund may cease – you need to consider all relevant information before you make a decision to transfer your super. If you ask for information, your super provider must give it to you.

Some points you should 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, and exit or withdrawal fees. Your TO fund may also charge entry or deposit fees on transfer. 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 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 – other funds may not offer insurance, or may require you to pass a medical examination before they cover you.

When considering a new fund, you should consider checking the costs and amount of any insurance cover offered.

What happens if you do not quote my Tax File Number (TFN)?

You are not required to provide your TFN to your super fund. However, if you do not provide your TFN, your fund may be taxed at the highest marginal tax rate, plus the Medicare levy, on contributions made to your account in the year, compared to the concessional tax rate of 15%. Your fund may deduct this additional tax from your account.

If your super fund does not have your TFN, you will not be able to make personal contributions to your super account. Choosing to quote your TFN will also make it easier to keep track of your super in the future.

Under the Superannuation Industry (Supervision) Act 1993, your super fund 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 super provider when your benefits are being transferred, unless you request in writing that your TFN is not to be disclosed to any other trustee.

Transfers to self-managed super funds

You must use the form Rollover initiation request to transfer whole balance of superannuation benefits to your self-managed super fund (NAT 74662) to transfer your benefits to your own self-managed super fund (SMSF).

‘we’re here to help’

For more information or assistance with rolling over please call our dedicated Member Services Team on 1300 361 477 between 8.30am - 5.00pm (AEST/AEDT) Monday - Friday.

The information in this document is general in nature and does not take account of your personal financial objectives, situation or needs. Before deciding whether a particular product is appropriate for you, please read and consider the relevant Product Disclosure Statement, Target Market Determination and Financial Services Guide available at guildsuper.com.au or by calling us. You should speak with a financial adviser to obtain advice tailored to your personal circumstances. Contact us about the intrafund advice services you may be able to access through your membership. Past performance is not a reliable indicator of future performance. The Promoter and the Trustee take no responsibility for you acting on the information provided. Any decision that you make is at your own risk. Issued by Stewarda Pty Ltd ABN 56 098 527 256, AFSL 236049, RSE Licence L0000185 as trustee of the Smart Future Trust ABN 68 964 712 340, RSE Registration No R1000566 (the Fund). GuildSuper and GuildPension are products in the Fund.

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