

# MTAA Super rollover initiation request to transfer whole or partial balance of superannuation benefits between funds under the *Superannuation Industry (Supervision) Act 1993*

Please call us on **1300 362 415** if you require any assistance.

## Authorisation to roll over super into MTAA Super

### Please complete this form using CAPITAL LETTERS

If you have more than one account to roll over, call us on **1300 362 415** or you can download an additional form at [mtaasuper.com.au/member-forms](http://mtaasuper.com.au/member-forms). Each application must have your original signature on it.

**Note: \*Denotes mandatory field. If you do not complete all of the mandatory fields, there may be a delay in processing your request**

### Completing this form

- Read the important information overleaf
- Refer to instructions where indicated with: ①
- This form is for either whole or partial balance transfers

### After completing this form

- Sign the authorisation
- Send the original form to either your **FROM** (transferring) fund or your **TO** (receiving) fund

## Section A

### Personal details

\*Given name/s

\*Family name

\*Date of birth

Mr Mrs Ms Miss Other

       

\*Street address

\*Suburb

\*State

\*Postcode

Telephone (business hours)

Mobile

Email

\* Gender

Male

Female

TFN

Under the *Superannuation Industry (Supervision) Act 1993*, you are not obliged to disclose your TFN, but there may be tax consequences if you do not.

① See 'What happens if I do not quote my TFN?'

① **Previous address:** If you know that the address held by your **FROM** fund is different to your current residential address, give details below.

\*Address

\*Suburb

\*State

\*Postcode





## 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 benefits if you don't know where your super is
- transfer benefits from multiple super funds on this one form – a separate form must be completed for each fund you wish to transfer super from
- 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 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 choice. For the appropriate forms and information about whether you are eligible to choose the fund to which your employer contributions are made, visit [ato.gov.au](http://ato.gov.au) or call the Australian Taxation Office on **13 10 20**.

### ⓘ Things you need to consider when transferring your super

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 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. Your **TO** fund may also charge entry or deposit fees on transfer. Differences in fees 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. 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 may wish to check the costs and amount of any cover offered.

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

You are not obliged 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 non-concessional 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.

### ⓘ 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

Email [contact@mtaasuper.com.au](mailto:contact@mtaasuper.com.au)

Postal address Locked Bag 5134, Parramatta NSW 2124

Trustee Motor Trades Association of Australia Superannuation Fund Pty. Limited  
ABN 14 008 650 628 AFSL 238 718

Fund MTAA Superannuation Fund ABN 74 559 365 913

[mtaasuper.com.au](http://mtaasuper.com.au)

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