

Super Rollover Your Super Form

Complete this form to transfer the whole or partial balance of a super account to LUCRF Super.

Please print clearly using an in boxes where required.

! **IMPORTANT:** This form will not change the fund to which your employer pays your contributions. If you'd like your employer contributions to be paid to your LUCRF Super account, complete a Choice of Fund Form at lucrf.com.au or call us on **1300 180 780**.

Step 1 | Your details

Please read our **Personal Information Collection Statement and Privacy Policy** for details on how we collect and disclose personal information. They're available at lucrf.com.au/privacy or by calling **1300 130 780**.

LUCRF Super member number

(please call **1300 130 780** if you don't know your member number)

Title

 Mr Mrs Miss Ms Other (please specify)

First name(s)

Last name

Date of birth

 / /

Gender

 Male Female Other

Contact details

Unit/Street number

Street name

Suburb/City/Town

State

Postcode

Email address

Home phone

 ()

Work phone

 ()

Mobile

Step 2 | Your tax file number (TFN)

A. Provide your TFN

We're authorised under legislation to collect, use and disclose your TFN. Where provided, it will be kept confidential and used only for lawful purposes (which may change in the future). It's not an offence if you choose not to provide your TFN. However, giving us your TFN means that we can accept all types of contributions to your account. You also won't be subject to additional tax as a result of failing to provide your TFN and it'll be easier for you to find other super accounts in your name. If we transfer your super to another fund, we may disclose your TFN to the other fund unless you send us a request in writing not to disclose it.

I have already provided my TFN.

OR

I choose to provide my TFN. I am aware I do not have to provide my TFN, but by providing it I understand LUCRF Super will only use it for legal purposes.

I declare that my TFN is:

i **Important:** We can use your TFN to periodically search for any super accounts you may have elsewhere using the Australian Taxation Office (ATO) SuperMatch service. Simply complete a Super Search Consent Form available at lucrf.com.au or by calling us on **1300 130 780**.

Step 4 | Sign and date this form

By signing this request form, I'm making the following statements:

- I declare I have fully read this form and the information completed is true and correct.
- I am aware I may ask my superannuation provider(s) for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits (including insurance cover), and have obtained or do not require such information.
- I have read and understood LUCRF Super's Personal Information Collection Statement and Privacy Policy. I consent to my tax file number and personal information provided on this form being disclosed for the purposes of consolidating my account.
- I discharge the superannuation provider(s) of my FROM fund(s) of all further liability in respect of the benefits paid and transferred to my TO fund.
- I request and consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect to this transfer.

Signature



Date

DD / MM / YYYY

Checklist

Before you send this form to us, make sure you have:

- read the important information
- considered where your future employer contributions will be paid
- completed all required fields (marked with *)
- signed and dated this form at Step 5.

Send this form to

LUCRF Super
PO Box 211
North Melbourne VIC 3051

Or scan and email it to: mypartner@lucrf.com.au

 If you need any help completing this form, please call us on **1300 130 780** or email mypartner@lucrf.com.au.

Important information

 **This transfer may close your account – you'll 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 more than three funds on this one form – a separate form must be completed for each additional fund you wish to transfer super from
- change the fund to which your employer pays contributions on your behalf
- open a super account
- transfer benefits under certain conditions or circumstances – for example, if there's a super agreement under the *Family Law Act 1975* in place.

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.

Fees – your **FROM** fund must give you information about any exit or withdrawal fees. If you're 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. Differences in fees that funds charge can have a significant effect on the super you'll have to retire on – for example, a 1% increase in fees may significantly reduce your final benefit.

Insurance cover – your **FROM** fund may insure you against death, illness or an accident which leaves you unable to return to work.

If you choose to close that account and leave the fund, you may lose any insurance entitlements you have with them, or you may be able to transfer your insurance benefits across to LUCRF Super. If you're going to apply to transfer your cover, **DO NOT** send us this rollover form until the insurer accepts your application. For information about cost and amount of cover that LUCRF Super provides and insurance matching/transferring, visit lucrf.com.au/insurance.

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

If you've changed your name, you must provide us with a certified copy of your marriage certificate, your deed poll name change certificate, your new birth certificate, or a divorce order.

If you're signing on behalf of another person, you'll need to provide certified proof of the link between you and the other person. You can use guardianship papers or Power of Attorney, as well as your other certified ID (such as your driver licence or passport).