

5-step rollover form



Complete *both sides* of this form to transfer money from your existing superannuation fund to RBF. Note that no fees will be charged by RBF to process this transfer. If you need any help with this form, please phone our friendly staff on 1800 622 631.

STEP 1 Personal details

RBF membership number: Date of birth:

Full name:

Postal address:

Suburb: State: Postcode:

Phone numbers:
(Home) (Business) (Mobile)

STEP 2 Details of fund you are transferring from

If you would like to transfer from more than one fund, please photocopy this form before completing steps 2-5.

Name of former fund:

Fund ABN: (Australian Business Number)

Fund membership number:

Postal address of fund:

Suburb: State: Postcode:

Phone number of fund:

Amount to be rolled over: Balance of account or \$ please specify amount

STEP 3 Proof of identity

To process your rollover request, your former fund may need proof of your identity. You can attach the necessary documents to this form or send them directly to your former fund. If you choose to send them directly to RBF and you are completing more than one rollover please provide original documents with each form.

See overleaf for information on acceptable proof of identity.

I have attached an original certified copy of my driver's licence or passport

OR

I have attached original certified copies of both:

Birth Extract/Certificate, Citizenship Certificate or Centrelink Pension Card
AND

Government or local council notice (less than 1 year old) with my name and address; or

Centrelink payment letter

OR

I have sent original certified copies of documents as proof of my identity, directly to my other superannuation fund

Continued overleaf

Proof of identity

You must provide a certified copy of certain documents to prove you are the person to whom the superannuation entitlements belong.

All copied pages of original proof of identification documents need to be certified as true copies by an individual approved to do so.

The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (eg Justice of the Peace, Australia Post employee, etc) and date.

The following can certify copies of the originals as **true and correct** copies:

- ▶ a permanent employee of Australia Post with five or more years of continuous service
- ▶ a finance company officer with five or more years of continuous service (with one or more finance companies)
- ▶ a notary public officer
- ▶ a police officer
- ▶ a registrar or deputy registrar of a court
- ▶ a Justice of the Peace
- ▶ a person enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia, as a legal practitioner
- ▶ an Australian consular officer or an Australian diplomatic officer
- ▶ a judge of a court
- ▶ a magistrate, or
- ▶ a Chief Executive Officer of a Commonwealth court.

STEP 4 Authorisation

By signing this request form I am 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 RBF or my former fund for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits or insurance cover, and do not require any further information.
- ▶ I authorise the transfer to RBF of any outstanding contributions that may be received by my former fund after the transfer of my benefits to RBF.
- ▶ Subject to the foregoing, I discharge the superannuation provider of my former fund of all further liability in respect of the benefits paid and transferred under this rollover request.
- ▶ I understand that in certain cases, RBF may be required by law to deduct tax from the untaxed element of my transferred benefit.
- ▶ The Trustee of my former fund may pass my Tax File Number and any other documents necessary to complete this transfer to RBF unless I contact them directly and request them not to do so.
- ▶ I request and consent to the transfer of my superannuation as described above and authorise the superannuation provider of each fund to complete this transfer.
- ▶ I authorise, subject to any legislative restrictions, the deduction of any transfer fees (if any) from my other superannuation fund.

Signature

Date

STEP 5 Post this form to RBF with proof of identity documents

Retirement Benefits Fund, Reply Paid 446, Hobart Tasmania 7001 (no stamp required if posted in Australia).

Fund compliance statement

Information for the other superannuation fund

This information is provided in respect of a request from our member to transfer funds into the Retirement Benefits Fund.

RBF is a scheme established by or operated under the Retirement Benefits Act 1993 listed in Schedule 1AA of the Superannuation Industry (Supervision) Regulations 1994. The RBF is therefore an exempt public sector superannuation scheme for the purposes of SIS Regulation 1.04(4A). RBF is deemed to be a complying superannuation fund for tax purposes and is eligible to accept rollover payments from other funds.

Australian Business Number 51 737 334 954.

When transferring funds, please include the member's full name and membership number.

Cheques should be made payable to RBF and forwarded to:

Retirement Benefits Fund
GPO Box 446, Hobart Tas 7001

Enquiries should be directed to **RBF** by phoning **(03) 6233 3672**.