

Rolling into AvSuper



Many working Australians find themselves with multiple superannuation accounts – often one from each job they’ve had. By rolling those accounts into AvSuper, most people find that:

- they pay less administration fees
- they have less paperwork to manage
- monitoring their retirement savings is quicker and simpler

You can transfer your old super to AvSuper at any time free of charge (compare fees and check if you could forfeit other benefits by leaving your old fund) by completing the roll into AvSuper form overleaf or logging into AOL.

It's simple to roll your money and insurance cover to AvSuper...

eRollover at AOL

OR

- 1. complete both sides of this form**
- 2. get your recent member statement from your old fund**
- 3. send your form and statement to AvSuper**

We'll do the rest, including closing your old account for you.

Transfer of insurance

If eligible, you may be able to transfer your existing death and TPD insurance cover (up to \$1,500,000) from any super account having received compulsory employer contributions on your behalf. Note that insurance cover will not commence until your super rollover has been received. Please include a copy of your most recent benefit statement as evidence of your cover.

Amount of current cover \$ Type of cover held: Death only Death and TPD

This will be rounded up to the next unit of AvSuper cover. Premiums will apply to any insurance cover. See our member insurance guide for premium and eligibility details.

Eligibility for transfer of insurance

Please tick yes or no for the following questions. Note that any 'yes' responses may require you to apply for voluntary cover rather than transfer your existing cover.

- Are you leaving your existing super account and associated insurance open? Yes No
- Do you have any injury or illness which restricts you, or is likely to restrict you in the future, from carrying out all the identifiable duties of your current employment on a full time basis even if you work part-time? ('Full time' means more than 30 hours a week on an ongoing basis.) Yes No
- Have you ever submitted a claim for Total and Permanent Disablement (TPD) or are you eligible for or entitled to a claim such a benefit from any superannuation fund or any insurance policy? Yes No
- Do you have, or have you ever had, any disease, illness or injury, or other conditions which:
a. has required more than a total of two consecutive weeks off work during the last 12 months, or
b. has recurred more than twice in the last two years, and/or is currently causing you symptoms or requiring treatment? Yes No
- Is your existing cover subject to any premium loading, restriction or exclusion in regards to medical or other conditions? Yes No

Compliance information (for your old fund)

The AvSuper Fund (SFN 1601/749/47, ABN 84 421 446 069) is a complying, resident, regulated superannuation fund under the Superannuation Industry (Supervision) Act 1993 (SIS Act) and is constituted under a trust deed dated 17 July 1990. The Trustee of the Fund is AvSuper Pty Ltd (ABN 46 050 431 797).

The Trustee confirms that it has not received, and does not expect to receive, any notice under section 63 of the SIS Act which impact on the status of the Fund. AvSuper meets the insurance requirements for a default fund under super choice legislation. AvSuper is a public offer fund and therefore able to accept member rollovers and contributions from any employer on behalf of our members.

Payment may be made by a direct deposit into our bank account:

Account name **AvSuper Fund**
BSB **062-000**
Account **1997 4688**
Bank **CBA**

Information identifying the member and the rollover benefits statement (RBS) is required for all contributions, and can be emailed to us at avsinfo@avsuper.com.au

Please send your completed roll into AvSuper form to AvSuper Admin, Locked Bag 20127, Melbourne VIC 3001

1300 128 751 avsinfo@avsuper.com.au www.avsuper.com.au

Please send your completed form to AvSuper Admin, Locked Bag 20127, Melbourne VIC 3001. Using this form will transfer your old super into your AvSuper account; if applicable, remember to tell your employer to send your contributions to your AvSuper account.



Roll into AvSuper

Personal details

Surname			Mr/Mrs/Ms/Miss
Given names			
Address			
Telephone (daytime)	AvSuper member number	Date of birth	

Please let us know of any new address details via **AOL** or a **Change of details** form.

Tax file number (TFN)

Under the Superannuation Industry (Supervision) Act 1993, AvSuper is authorised to collect, use and disclose your TFN. We may disclose your TFN to another super provider, when your benefits are being transferred, unless you request, in writing, that your TFN not be disclosed to any other super provider.

Declining to quote your TFN to AvSuper is not an offence. However giving your tax file number to us will have the following advantages:

- we will be able to accept all permitted types of contributions to your account/s;
- other than the tax that may ordinarily apply, you will not pay more tax than you need to for super contributions and payments when you start drawing down your super benefits; and
- it will make it much easier to find different super accounts in your name so that you receive all your superannuation benefits when you retire.

My Tax File Number is:

I consent to my TFN being used to search the ATO database for other super accounts I may have. Yes No

Roll into AvSuper Please roll over my balance (to close my account) from the following super fund:

Name of fund			Member or account number (if known)
Address of fund			
Telephone	ABN	Superannuation Product Identification No. (SPIN)/Electronic Service Address (ESA)	

Did you know you can transfer your old insurance cover to AvSuper as well? See overleaf for details.

Proof of identity (Please refer to our website for our fact sheet about certified copies and approved persons)

It is no longer a legislative requirement but your old fund may still require you to provide ID to withdraw your money - please check with them.

Declaration

- I request the above transfer of funds and authorise my other super fund to transfer my money to AvSuper. I discharge my old super fund of all further liability of money paid and transferred to AvSuper.
- I understand that if I have not made an investment choice, my money will be invested in the Growth (MySuper) option by default but I can change this at any time.
- I received professional financial advice before completing this form, or chose not to although I know I could have done so.
- If transferring insurance (see overleaf), I have read and understand the general terms and conditions for cover in AvSuper's member insurance guide. I acknowledge that cover is subject to me satisfying the insurer's requirements, including providing evidence of health, and written acceptance of my application for cover by the insurer.
- I understand that I have a current and ongoing duty to take reasonable care to not misrepresent anything that may influence the insurer's decision about my cover. I have read the full **duty to take reasonable care** on AvSuper's website.
- I have accessed the AvSuper privacy notice (available from www.avsuper.com.au or by phoning 1300 128 751).

Signature (If submitting this form via email, please type your name below.)

Date

1300 128 751 avsinfo@avsuper.com.au www.avsuper.com.au