

Easy transfer

What do I use this form for?

If you have superannuation in a fund other than QSuper, and you would like to transfer it into QSuper, you can complete this form to allow us to arrange this for you. We will accept rollovers from super accounts from previous employers, approved deposit funds, and personal superannuation policies. For more information on this easy transfer process, please read the *Rolling over other super to QSuper* fact sheet. Please complete in dark blue or black ink.

PLEASE NOTE:

- ☐ You must complete a separate *Easy transfer* form for each superannuation account you would like to transfer to QSuper. Additional *Easy transfer* forms are available from our website or by calling us. You can also photocopy this form.
- ☐ Before completing this form, you should contact your other fund to find out if rolling over your super will result in the loss of any benefits, including insurance.
- ☐ Your transfer will be invested according to your investment preference or, if you have not nominated an investment preference, the default option (which is the Balanced option). If you want to change your investment preference you can complete an *Accumulation account investment switch* form, you can download this form from our website, or call us and we'll send you one.
- ☐ You can't use this form to transfer an overseas pension fund to Australia. For more information, please see the *Transfer of overseas pension funds* fact sheet, which you can download from our website, or call us and we'll send you one.
- ☐ **This form is not to be completed if:**
 - you expect more money to be paid on your behalf into your other super fund, or
 - you only want to transfer part of the money in your other super fund to QSuper.
- ☐ If your name at the other fund is different, you will need to provide us with a certified true copy of your marriage certificate, change of name certificate, deed poll, or decree nisi to make sure the transfer can be completed.
- ☐ If you are acting on behalf of a QSuper member (e.g. under a power of attorney), both you and the QSuper member must supply identification as described in this section of the form. A certified copy of the power of attorney is also required.

PART A QSUPER ACCOUNT DETAILS

If you know your QSuper account number, please enter it in the box below.

Accumulation account: SPIN: QSU0101AU

Defined Benefit account: SPIN: QSU0102AU

Account number:

HELPING HAND
You can find your account number on your benefit statement.

PART B PERSONAL DETAILS

Title: Mr Mrs Miss Ms Dr

Surname:

Given names:

Residential address:

State:

Postal address: Same as above Different (please provide below)

State: Postcode:

Phone number (home): (work):

(mobile):

Email address:

Date of birth: / / (dd/mm/yyyy)

PART C DETAILS OF OTHER SUPERANNUATION ACCOUNT

You must complete a separate *Easy transfer* form for each superannuation account you would like to transfer to QSuper.

Name of other fund:

Postal address of other fund:

State: Postcode:

Phone number:

Policy/member number:

If, in the other fund your name or address is different, please provide the details below.

Name (as recorded by other fund):

Address (as recorded by other fund):

State: Postcode:

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Notes for the other super fund

- ▶ QSuper is a resident regulated superannuation fund within the definition of the *Superannuation Industry (Supervision) Act 1993*.
- ▶ QSuper's superannuation fund number is 2610 419 41 and our ABN is 60 905 115 063.
- ▶ All cheques should be made payable to QSuper, crossed not negotiable, and sent to the address shown below.
- ▶ Please attach a superannuation lump sum rollover statement or other form that provides details of the rollover.

PART D DECLARATION AND AUTHORISATION

- I declare I [am the person named on this form or have a power of attorney to act on the member's behalf]¹.
- I give authority to QSuper to arrange the transfer of my benefits from my other super fund.
- Once payment is made to QSuper, I discharge the other super fund from any further liability.
- I declare I have read and understood the *Investment choice at a glance* fact sheet and the notes on this form.
- I declare all information provided in this form is true and complete.
- I request any contributions received by the other super fund, after the benefit is transferred, be paid to QSuper.
- I understand my other fund/s may contact me to ask for documents to satisfy their proof of identity requirements.
- I give approval for the deduction of transfer fees (if any) from the other super fund. Please note, no fees will be charged by QSuper to process this transfer.
- I have supplied the necessary documentation as outlined in the section below.
- I understand that this transfer will be invested according to my investment preference, or, if I have not nominated an investment preference the default investment option (Balanced option).

¹ Cross out whichever is not applicable.

(Signature)

X SIGN HERE

(Date – dd/mm/yyyy)

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IDENTIFICATION REQUIREMENTS

These are the standard identification requirements your other fund may need before they can roll your funds to QSuper. You must provide a **certified copy** of one of the following current documents, which contains your name, photograph, and either date of birth or residential address.

Please indicate which document you have attached:

- a current foreign passport (any documents written in a foreign language must be accompanied by an English translation prepared by an accredited translator)
- a current Australian driver's licence
- a current Australian passport.

Please see below for certification procedures and a list of approved certifiers.

The transfer can take up to two months. Under current legislation, the transferring fund has 30 days to action the transfer upon receipt of this form.

CERTIFICATION PROCEDURE

- Take the original and a copy of your selected documents to an acceptable certifier (see list to the right) who will verify that the original documents have been sighted.
- Ensure that the certifier sights the original and signs the copy, confirming it is a true copy of the original. The certifier must also include their name, the date of certification, and their certifying designation from the list of acceptable certifiers.
- Post this form and the certified copy of your identification to QSuper. We cannot accept facsimiles or copies of the certified documents. Please do not send us your original documents.

WHO TO SEE	CONDITIONS AND DEFINITIONS
Australia Post	An agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public; or a permanent employee of the Australian Postal Corporation with five or more years of continuous service who is employed in an office supplying postal services to the public.
Banking and other financial institutions	An officer with five or more continuous years of service with one or more financial institutions or a finance company officer with two or more continuous years of service with one or more financial companies.
Justice of the peace or notary public	An individual appointed by the courts whose duties include certifying documents.
Legal professionals/ law enforcement	A person who is enrolled on the roll of the Supreme Court of a State or Territory, or High Court of Australia, as a legal practitioner. Other professionals include a judge of a court, a magistrate, a chief executive officer of a Commonwealth court, a registrar or a deputy registrar of a court, or a police officer.
Accountants	A member of the Institute of Chartered Accountants in Australia, CPA Australia, or the National Institute of Accountants, with five or more years of continuous membership.
Consular or Diplomatic Officer	An Australian Consular Officer or an Australian Diplomatic Officer.

Contacting QSuper

Contact Centres

70 Eagle Street Brisbane
 63 George Street Brisbane
1300 360 750 (+617 3239 1004 if overseas)
 Monday to Thursday 8.30am to 5.00pm
 Friday 9.00am to 5.00pm

GPO Box 200
 Brisbane Qld 4001
 Fax 07 3239 1124

qsuper.qld.gov.au

ABN: 60 905 115 063
 SFN: 2610 419 41

The privacy of your personal information is important to us. QSuper Limited (ABN 50 125 248 286, AFSL 334546) is collecting this information on behalf of the QSuper Board of Trustees to administer your superannuation account. If you would like further information about our privacy policy, you can download QSuper's *Your privacy* fact sheet from our website. Alternatively, call us and we'll send you a copy.