

Transfer to Another Super Fund

When to use this form

Use this form if you want to transfer all or part of your super from a QSuper account to another super fund, including a self-managed super fund (SMSF).

If you've started working for a new employer, it's important to know that you can keep your QSuper account. For more information, visit qsuper.qld.gov.au/changingjobs or call us on **1300 360 750**.

If you would like your employer contributions to go to another super fund, please ensure that you arrange this with your employer before you submit this form.

Please complete in **BLOCK** letters, in blue or black ink.

1 Personal details

Client number

Residential address

Your client number can be found on your annual statement or by logging in to Member Online.

State

Postcode

Postal address

As above

Title

First name

Last name

State

Postcode

Previous name¹ (if we know you by another name)

Date of birth (dd/mm/yyyy)

/ /

Home phone number

Mobile phone number

Work phone number

Email address

¹ We cannot process a transfer if the name on the form is different to the name on our records. If your name has changed and you work for a Queensland Government or default employer, let your payroll office know and they will let us know. Otherwise, please send us a certified copy of either a marriage certificate or other legal change of name document.

2 Full or partial transfer

OR

Option 1 – Full transfer and close account

I want to transfer all funds from QSuper. I understand this will cancel my membership including any insurance cover. **Proceed to section 3.**

Option 2 – Partial transfer and keep account

I want to keep my QSuper Accumulation account or Income account open. You must keep a minimum balance of \$6,000 in an Accumulation account. If you have money in Self Invest, you need to keep a minimum of \$10,000 (Accumulation accounts) or at least 13 months' worth of income payments (Income accounts) invested in one or more of the other QSuper investment options.

Partial amount to transfer

Please tell us how much money you want to transfer out of your QSuper account.

I want to transfer the following amount:

\$

Account to take funds from:

Accumulation account: **Accumulation account number** (if you have multiple accounts):

Income account: **Income account number** (if you have multiple accounts):

Defined Benefit account

Deferred Retirement Benefit account (DRB)
(please also complete section 3)

If you do not specify an account number, we will decide which account to transfer from.

! Defined Benefit or DRB

If you are transferring from a Defined Benefit or Deferred Retirement Benefit account, you will need to complete additional documentation.

For more information, see the Defined Benefit Account Guide at qsuper.qld.gov.au/guides or call us on **1300 360 750**.

3 Opt out of your Deferred Retirement Benefit (optional)

Only complete this section if you have a Deferred Retirement Benefit. **If not, proceed to section 4.**

I do not want the Deferred Retirement Benefit and I want to transfer the discounted value of the funds out of this account.

I understand that if I choose this option and close my Deferred Retirement Benefit account, I can't reopen it. I also understand that if I'm under age 55 when leaving the Deferred Retirement Benefit, the amount transferred will be a discounted amount, as explained in the Defined Benefit Account Guide.

We recommend you speak with a financial adviser before choosing to close your Deferred Retirement Benefit account. The Deferred Retirement Benefit account is very different to the Accumulation account and isn't easily comparable.

4 Fund to transfer your money to

Please select the type of superannuation fund you're transferring to and provide us with the necessary account information.

Transfer – Option 1

I want to transfer to an approved registered super fund.

Fund name	Product name
Client/account number	Fund phone number
Fund USI/SPIN	Fund ABN

The fund **Unique Superannuation Identifier (USI)** can be found on the other fund's website and might be called a SPIN. **We may not be able to process your request without this.**

OR

Transfer – Option 2

I want to transfer to a self-managed super fund.

Self-managed super fund (SMSF) name

Australian business number (ABN)

Electronic service address (ESA)

Branch (BSB) number

Account number

Please attach to this form a **copy of a bank statement for the SMSF account** listed above, no older than 6 months.

To proceed with this request, the name of the bank account provided must match the details for your registered SMSF at the Australian Taxation Office (ATO).

5 Proving your identity

If you are transferring your funds to a SMSF, you are required to prove your identity by completing this section of the form. **If not, proceed to section 6.**

You can prove your identity by either:

Option 1 – Electronic identification

(not available for people currently living overseas)

To prove your identity electronically, please provide us with your driver licence or passport number.

From here QSuper will provide your name, address, and date of birth to a credit reporting agency (CRA) to check if your personal information matches your credit information file with the CRA. This will allow us to verify you under the Anti-Money Laundering and Counter-Terrorism Financing Act 2006 before making your payment. It doesn't give us access to other information about you, our request won't be recorded on your credit information file, and the CRA can't use it for anything else. If we cannot identify you in this way, we will write to you advising the name of the CRA and another way to verify your identity.

I am authorised to provide my personal details and consent to my information being checked with the relevant third party.

Driver's licence number State of issue

If using your driver's licence as proof of identity, please also give us your driver's licence card number, which is different to your licence number.

Driver's licence card number

OR

Passport number Previous name

Country of birth

OR

Option 2 – Certified identification

You can post, email, or fax us certified copies of your identification document as explained in the Proving Your Identity factsheet on our website.



Transferring to SMSF

We can't process your transfer to your SMSF if you have not provided an electronic service address (ESA) for your SMSF. For more information on this requirement, visit

ato.gov.au/Super/Self-managed-super-funds/Setting-up/Get-an-electronic-service-address/

6 Providing your tax file number

Under the Superannuation Industry (Supervision) Act 1993, your super fund is authorised to collect your tax file number (TFN), which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change. If you transfer your super to another fund, we may disclose your TFN to the other super provider unless you tell us not to in writing. You don't have to provide a super fund with your TFN, but providing your TFN to your super fund will have the following advantages (which may not otherwise apply):

- Your super fund will be able to accept all types of contributions to your account(s)
- The tax on employer contributions to your super account(s) will not increase
- Other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your super benefits
- It will make it much easier to trace different super accounts in your name so that you receive all your super benefits when you retire.

Your TFN

7 Reason for transfer (optional)

Please tell us why you're transferring to another fund. You can choose more than one reason.

I've changed employer

Employer name

Financial advice from:

Adviser name

Business name

I want greater control of my money

I'm unhappy with:

Service Investment returns Fees

Other (please give details):

Do you want to give us any feedback on what we can do better?

Tick this box if we can call you to talk about your feedback in more detail.

8 Declaration and authorisation

- I am the person named on this form or have a power of attorney to act on the member's behalf.
- The information I have given on this form is true and correct.
- If I am transferring my benefit to a self-managed superannuation fund (SMSF), I confirm I am a member, trustee, director, or a corporate trustee of the SMSF.
- I understand Australian Retirement Trust has no further legal responsibility for the benefits that are transferred to the other fund or if I have chosen to permanently opt out.
- I understand my QSuper insurance will be cancelled if I am transferring my entire balance to another fund.
- I understand that any insurance I already hold or receive as a result of submitting an application for an Accumulation account will be cancelled in certain circumstances.²
- I ask for and give my permission to transfer my super as described above, and I give permission to the super provider of each fund to process this transfer.

Name

Signature

(Please sign in blue or black pen – we don't accept electronic signatures on this form.)

Date signed (dd/mm/yyyy)

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9 Checking your attachments

If you are transferring to a SMSF and in section 5, you selected Option 2 – Certified identification, please make sure you attach certified copies of your proof of identification documents. For more information, please read the identity section of our website or read our Proving Your Identity factsheet at qsuper.qld.gov.au/factsheets.

If you are signing as a power of attorney and you haven't already done so, you'll need to attach a certified copy of your power of attorney documentation. You must also attach certified copies of your and the member's identification documents.

If you are selecting a rollover to your SMSF, you will need to attach a copy of your bank statement.

Where to send this form

Please send your completed form to us by:

Post

QSuper
GPO Box 200
Brisbane QLD 4001

Email

qsuper@qsuper.qld.gov.au

Transfer processing timeframes

We will process your transfer request within the following timeframes, once all the required information has been received:

- 3 business days – for full balance transfers from an Accumulation account
- 6 business days – for transfers to a SMSF.

We will aim to process all partial transfers and transfers from other types of accounts within 7-10 business days. In busy periods, this may take longer.

² There are various circumstances when cover will end. See the *Insurance Guide* at qsuper.qld.gov.au/pds

Member Centres

Visit qsuper.qld.gov.au/membercentres
for locations

Member Services team

Phone 1300 360 750
Overseas +61 7 3239 1004
Monday to Friday 8:00am–6:00pm (AEST)

Postal address GPO Box 200, Brisbane QLD 4001

Email qsuper@qsuper.qld.gov.au

Fax 1300 242 070

Website qsuper.qld.gov.au

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