

Consolidating Your Super with QSuper

Take control of your super

If you have worked at a few different places, chances are you have numerous super accounts, making it difficult to keep track of how much you actually have. By consolidating all your super into one account, you could maximise your investments while reducing the number of fees you are paying.

Before you consolidate

We have made it easy for you to get your super together in the one place, and we don't charge you any fees to consolidate.

Just make sure you check with your other fund/s first to see if you'll lose any benefits like insurance or pension options. If you have insurance cover with another provider, you can also transfer your cover to QSuper by using the *Transfer My Cover From Another Insurer* form. You will just need to make sure your transfer of cover is complete before you consolidate your super. If your transfer is approved, you won't have to re-serve any waiting or pre-existing exclusion periods.

How to consolidate your super

Log in to Member Online at memberonline.qsuper.qld.gov.au and provide us with the details of your other super fund/s and we will do the rest.

Alternatively, you can fill out a *Consolidate with QSuper* form to consolidate your funds. The form is at the back of this factsheet and you can download it from our website at qsuper.qld.gov.au/forms or call us to request a copy.

We then contact your other super fund/s and request the transfer to your QSuper account, and will let you know when we've finalised your request.

If you choose to use your other fund's form to organise the transfer, you will need to provide your member number and the following details about us:

- ABN – 60 905 115 063
- Unique Super Identifier (USI): 60 905 115 063 001.

What happens next?

We will add your super to your QSuper account and send you a statement showing your balance each year. Also, you can view your balance at any time with Member Online. If you haven't already signed up, it's easy. Just jump on our website at qsuper.qld.gov.au and follow the prompts.

If you want to know more about your super, from your contribution options through to investment options, take a look at our *Accumulation Account Guide* on our website, or call us to request a copy.

For more information

To find new ways to get more out of your super, try our tools and calculators on our website at qsuper.qld.gov.au

Or call us on **1300 360 750** we'll be happy to discuss your options.

Member Centres

70 Eagle Street, Brisbane

63 George Street, Brisbane

Sunshine Coast University Hospital, Ground Floor,
Main Hospital Building, 6 Doherty Street, Birtinya

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

This information and all products are issued by the QSuper Board (ABN 32 125 059 006, AFSL 489650) as trustee for QSuper (ABN 60 905 115 063).
Consider whether the product is right for you by reading the product disclosure statement (PDS) available from our website or by calling us on 1300 360 750.

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Consolidate With QSuper

How to use this form

Complete this form if you have another superannuation account and would like to transfer part of or all of the money from that account into your QSuper account. If you want to transfer more than one account, please complete section 2 in full.

Instead of using this form, you can consolidate your other super money to QSuper through Member Online at memberonline.qsuper.qld.gov.au or search for your other super at my.gov.au

If you don't already have an Accumulation account, you can easily apply online at qsuper.qld.gov.au or download an *Open an Accumulation Account* form at qsuper.qld.gov.au/forms

If you want to transfer an overseas pension fund to Australia, don't use this form. For more information about your options, please see our *Transfer of Overseas Pension Funds* factsheet at qsuper.qld.gov.au/factsheets or call us to request a copy.

For more information on the consolidation process, read *Consolidating Your Super with QSuper* at qsuper.qld.gov.au/factsheets or call us on **1300 360 750**.

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

1 Personal details

Client number

You can find your client number on your annual statement or by logging in to Member Online.

Title

First name

Last name

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

Residential address

State

Postcode

Postal address

As above

State

Postcode

¹ If your name has changed and you work for the Queensland Government or a default employer, let your payroll office know and they'll then let us know. Otherwise, please send us a certified copy of either a marriage certificate or other legal change of name document.

2 Details of your other super fund/s and amount you want to transfer (mandatory)

! If your name is listed differently at your other super fund, you'll need to contact them to update your details before you send this form to us.

If you are closing your other super account, make sure:

1. You have already asked your employer to pay your future super contributions to QSuper – see qsuper.qld.gov.au/changingjobs
2. You have found out whether or not transferring your super from your other super fund will mean you lose any benefits, including insurance, and to confirm whether you will be taxed.

Name of other fund 1

ABN of other fund²

Unique Superannuation Identifier (USI) of other fund²

Phone number of other fund

Your membership account number with other fund

My full balance

OR

Partial amount you want to transfer
(dollars and cents – do not round up or down)

\$

Name of other fund 2

ABN of other fund²

Unique Superannuation Identifier (USI) of other fund²

Phone number of other fund

Your membership account number with other fund

My full balance

OR

Partial amount you want to transfer
(dollars and cents – do not round up or down)

\$

Name of other fund 3

ABN of other fund²

Unique Superannuation Identifier (USI) of other fund²

Phone number of other fund

Your membership account number with other fund

My full balance

OR

Partial amount you want to transfer
(dollars and cents – do not round up or down)

\$

Name of other fund 4**ABN of other fund²****Unique Superannuation Identifier (USI) of other fund²****Phone number of other fund****Your membership account number with other fund** **My full balance**⋮
OR
⋮ **Partial amount you want to transfer**

(dollars and cents – do not round up or down)

\$

If you have other funds you want to rollin, please provide these details on a separate sheet of paper and attach it to the back of this form.

How your funds will be invested

Your transfer will be invested according to your current investment preferences. You can check your current investment options in Member Online at **memberonline.qsuper.qld.gov.au** under 'Investments' then 'Your investments', by checking your annual statement, or by calling us.

3 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. It is not an offence not to quote your TFN. However, 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

If we already have your TFN, you do not need to give it to us again.

4 Declaration and authorisation

- I know I can contact my other super fund to find out if transferring this money will affect my benefits with them. By signing this form, I am letting you know that I have either received this information from them, or I do not need any more information.
- I am the person named on this form, or have a power of attorney to act on the member's behalf.³
- I want QSuper to arrange the transfer of my money from my other super fund to my QSuper account.
- Once payment is made to QSuper, if I've selected to transfer my full balance from the other super fund, I understand this will close my account with that super fund.
- I have read and understood the *QSuper Product Disclosure Statement (PDS) for Accumulation and Income Accounts*.
- I want any contributions received by the other super fund, after my benefit is transferred, to 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 understand that my transfer will be invested according to my current investment strategy.
- I declare all information provided in this form is true and correct.

Name

Signature

Date signed (dd/mm/yyyy)

 / /

For more information

If you want to learn more about your super, or need help with your finances, we can help.



Calculators at qsuper.qld.gov.au/calculators

Try our educational calculators to learn more about your insurance, investments, how to maximise your super, and retirement planning.



Call us on 1300 360 750

Our Member Services team will be happy to discuss your account with you.



Advice

As a QSuper member, you have access to over-the-phone financial advice about your QSuper account from QInvest.⁴ For more information about the topics available, visit qsuper.qld.gov.au/financial-advice

³ If you're signing as a power of attorney and you haven't already given us a certified copy of your power of attorney documentation, please attach it to this form.

⁴ QInvest Limited (ABN 35 063 511 580, AFSL 238274) is a separate legal entity responsible for the financial services it provides. Eligibility conditions apply. Refer to the *Financial Services Guide* for more information.

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70 Eagle Street, Brisbane
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