

Roll your super into Catholic Super



It's simple: Complete this form, return it to us and we'll do the rest.

You should check whether your previous fund will charge you any exit or withdrawal fees, or how other benefits may be affected. For example, if you close your account any insurance cover you hold will cease. You may be eligible to transfer this cover to Catholic Super, contact us if you wish to do that.

1 – Your member details

Please complete in pen using CAPITAL letters

Member number

Title

Mr Mrs Ms Miss Other

Sex

Male Female

Date of birth (ddmmyyyy)

First name

Last name

Residential address

Suburb

State

Postcode

Country (if not Australia)

Business hours phone

After hours phone

Mobile

Email

2 – Other fund details

Fund name

Member number

Fund phone number

Fund Australian Business Number (ABN)

Fund Unique Superannuation Identifier (USI) or for a Self-managed super fund, enter the Fund's Electronic Service Address (ESA)

3 – Amount to transfer

Close the account and transfer the whole balance to Catholic Super.

Leave the account open, but transfer this amount to Catholic Super: \$, , .00

Need help?



1300 655 002



csf.com.au



Catholic Super, GPO Box 4303, Melbourne VIC 3001

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4 – Previous name or address (if your other fund held different details for you, noting them here may help avoid transfer delays)

Other previous name/s

Previous street address (if the details with your other fund are different to those above)

Suburb

State

Postcode

Country (if not Australia)

5 – Proving your identity

To protect your super, you need to prove your identity when you move money between super funds.

Use my tax file number to identify me: - -

By choosing this option, you are authorising us to pass your TFN to your other super fund who will use it to confirm your identity with the Australian Taxation Office. Your TFN is confidential and you don't have to give it to Catholic Super, however you may pay more tax than you have to if we don't have it and you will need to provide certified proof of identity documents to transfer super between funds. For more information about providing your TFN, please see your *Product Disclosure Statement (PDS)*.

I have attached certified proof of identity documents

For information about the documents you can provide and who can certify them, go to csf.com.au. This form and the identity documents you provide will be sent to your other fund so they can process your request.

Privacy

The personal information you provide on this form will be used in accordance with Together Trustee's Privacy Statement, which you can view online at csf.com.au/privacy or you can obtain a copy by contacting us on **1300 655 002**.

Together Trustee's Privacy Collection Statement details how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It includes details on how we collect, disclose and manage your personal information, including other entities and offshore locations that may receive or provide your information.

Our administrator, Mercer Outsourcing (Australia) Pty Ltd (Mercer), will also handle your personal information. You can view Mercer's Privacy Policy online at mercerc.com.au/privacy

If you have any other queries in relation to privacy issues, you can contact us or write to our Privacy Officer, GPO Box 4303, Melbourne VIC 3001.

6 – Sign the form

By signing this form I:

- declare I have read and understood this form and the information I have provided is complete and correct;
- am aware I may ask my super providers for information about any fees and charges that may apply and about the effect this transfer may have on my benefits (such as insurance in my previous fund);
- understand that on payment by my previous super fund, I discharge that super fund from any further liability in respect of the amount transferred;
- authorise Catholic Super (and its agents) to contact my previous super fund regarding this request to combine that account into Catholic Super.

Signature

Date (ddmmyyyy)

This form does not change the fund to which your employer pays your future contributions. To choose Catholic Super for your future contributions, simply download and complete a *Choice of Fund* form from our website or contact us for a copy.

Please return your completed form to Catholic Super, GPO Box 4303, Melbourne VIC 3001

Need help?

 1300 655 002  csf.com.au  Catholic Super, GPO Box 4303, Melbourne VIC 3001

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