

2. Previous fund membership details

Name of fund where money is held*

Fund Australian Business Number (ABN)

Telephone number of fund administrator

Name of fund administrator

Superannuation Product Identification Number (SPIN)

Previous fund member number

Administrator's postal address

Suburb

State

Postcode

Please cross one box only:

I would like First State Super to arrange the transfer of **my whole benefit** from another complying superannuation fund OR

I would like First State Super to arrange the transfer of **part of my benefit** from another complying superannuation fund.

Value to be transferred (if transferring part of your benefit)

\$

Approximate date of leaving this employer (DD-MM-YYYY)

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Name of employer contributing to previous fund

Complying fund status

The First State Superannuation Scheme (ABN 53 226 460 365, SPIN FSS 0100AU) is a resident regulated superannuation fund within the meaning of the *Superannuation Industry (Supervision) Act 1993 (SIS)* and a complying superannuation fund for the purposes of the *Income Tax Assessment Act 1936*. Transfers and rollovers can be accepted by the Trustee under the Trust Deed and Rules of First State Super. The Trustee will, upon receipt of the benefits transferred/rolled over, maintain and preserve the benefits in First State Super to the extent required by SIS and the SIS regulations.

3. Declaration

In signing this form, I am making the following statements:

- I declare that I am an Australian or New Zealand citizen and not a temporary resident of Australia.
- I declare that I have fully read this form and declare that the information on this form is true and correct.
- I understand and acknowledge the implications and effects of transferring my benefits from my previous superannuation fund to my First State Super account.
- I am aware that I may ask the trustee of my old superannuation fund for all the information that I need to understand my benefit entitlements in that fund (including information on exit, transfer, withdrawal and other fees, insurance, investment options and the effect of a transfer on those benefit entitlements) AND I do not require any further information.
- I irrevocably request and consent to the transfer of my benefits (as set out in Section 2 of this form) from the superannuation arrangement described in Section 2 to FSS Trustee Corporation (Trustee), as Trustee for the First State Superannuation Scheme. further authorise the Trustee to take all appropriate steps to effect the transfer of this benefit.
- I consent to the use and disclosure of information contained in this form in accordance with the Privacy Policy in the PDS.

Signature

Date (DD-MM-YYYY)

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Return the completed form to First State Super PO Box 1229 WOLLONGONG NSW 2500

If you have any enquiries please call Customer Service on **1300 650 873** between 8:30 am and 5:30 pm AEST from Monday to Friday for the cost of a local call (unless calling from a mobile or pay phone).

Proof of identity and document certification

In order to protect your benefit entitlement and to ensure your privacy is maintained, superannuation funds require you to provide certified documentation verifying your identity before your request can be processed. The documents that First State Super requires are summarised below and most superannuation funds require similar documents.

To ensure there is no delay processing your transfer request, please forward the appropriate certified documentation with this form. These documents must be certified by a suitably qualified person (see Certification of personal documents below).

You must provide EITHER one certified document from Part A OR two certified documents (one from each section) from Part B.

Part A – Acceptable primary ID documents

Select ONE valid document from this section

- Current Australian State/Territory driver's licence containing a photograph of the person
- Australian Passport (a passport that has expired within the preceding two years is acceptable)
- Card issued under a State of Territory for the purpose of providing a person's age containing a photograph of the person
- Foreign passport or similar travel document containing a photograph and the signature of the person*

OR

Part B – Acceptable secondary ID documents

Select ONE valid option from this section:

- Australian birth certificate
- Australian citizenship certificate
- National identity card issued by a foreign government containing a photograph of the person in whose name the card was issued*

AND

ONE valid option from this section

- A document issued by the Commonwealth or a State or Territory within the preceding 12 months that records the provision of financial benefits to the individual and which contains the individual's name and residential address
- A document issued by the Australian Taxation Office within the preceding 12 months that records a debt payable by the individual to the Commonwealth (or by the Commonwealth to the individual) which contains the individual's name and residential address
- A document issued by a local government body or utilities provider within the preceding 3 months which records the provision of services to that address or to that person (the document must contain the individual's name and residential address)
- Foreign driver's licence that contains a photograph of the person in whose name it was issued and the individual's date of birth*
- Pension card issued by Centrelink
- Health card issued by Centrelink

Certification of personal documents

The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping "certified true copy" followed by their signature, printed name, qualification (eg. Justice of the Peace, Australia Post employee, etc) and the date.

The following people can certify copies of the originals as true and correct copies:

- a Justice of the Peace
- a person enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia as a legal practitioner
- an Australian consular officer or an Australian diplomatic officer
- a judge of a court
- a magistrate
- a registrar or deputy registrar of a court
- a Chief Executive Officer of a Commonwealth court
- a permanent employee of Australia Post with five or more years of continuous service
- a finance company officer with five or more years of continuous service (with one or more finance companies)
- an officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having five or more years continuous service with one or more licensees
- a notary public officer
- a police officer.