



AFSL: 238395
ABN: 50 925 523 120
Board ABN: 72 406 779 248

Application to Pay in a Transfer Amount

Get the facts first

Before completing this form, please read the Product Disclosure Statement (PDS) for the Military Superannuation and Benefits Scheme, as well as the Transfer Amounts fact sheet which is available from the MilitarySuper website www.militarysuper.gov.au.

Who should use this form?

Use this form if you are a current contributing Member of the Defence Force Retirement and Death Benefits Scheme (DFRDB) or the MilitarySuper Scheme (MSBS) and you wish to transfer money from another superannuation fund to MilitarySuper.

When to use this form

Use this form:

- **To transfer other super money you have.** Complete this form and **send it to your previous super fund**. If you have super with more than one previous super fund you will need to complete a separate form for each super fund. Once your previous super fund money has been received and credited to your MilitarySuper account, you will receive confirmation from us.

Additional forms can be obtained from the MilitarySuper website or by phoning **1300 006 727**.

Definitions

A **transfer amount** is a superannuation payment paid from another superannuation fund and can include:

- an **Approved Deposit Fund**, which is a regulated superannuation fund holding Eligible Termination Payments
- a **Regulated Superannuation Fund**, which is generally one that has elected to comply with Superannuation Industry (Supervision) legislation
- a **Retirement Savings Account**, which is a superannuation product provided by banks, building societies, credit unions, life insurance companies or prescribed financial institutions
- a **Special Account**, which is a superannuation account holding Superannuation Guarantee payments made by employers. This account is administered by the Australian Taxation Office.

A Superannuation Lump Sum Payment is generally a lump sum superannuation benefit. A PAYG Payment Summary shows the taxation components of a Superannuation Lump Sum Payment.

Tax File Number

If you have not provided MilitarySuper with your Tax File Number (TFN) you may pay a higher rate of tax on contributions.

If you have not been issued a TFN you should lodge an *Australian Taxation Office Application/Enquiry* form with the Taxation Office. Forms are available at all Taxation Offices. You must provide proof of identity at the time you lodge the form.

Once the Australian Taxation Office has issued you with a TFN, please provide details in writing to MilitarySuper. You can do this by writing to:

MilitarySuper
PO Box 22
Belconnen ACT 2616

Privacy

The MSB Board and our administrator, ComSuper, are committed to protecting any information you give us. Your information will be used to send you news about your super and to contact you if we need to in the future.

Your information will not be used for any other purpose or disclosed to another party, unless:

- you authorise us to do so
- it is required by law
- it is to Orima Research who may, on our behalf, invite you to participate in a survey about our service (they are required to protect this information from disclosure to another party). If you do not want your contact details passed to Orima Research, please put a cross in the box at Part E on page 4.

For more information

For more information about transfer amounts or how to complete this form please call an Information Officer on **1300 006 727** (MilitarySuper) or **1300 001 677** (DFRDB).



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PART A About yourself

1. Service Navy Army RAAF

2. Scheme MSBS DFRDB

3. Membership number _____

4. Title _____

Surname _____

Given names _____

5. Date of birth / /
day month year

6. Postal address _____

7. Phone number (BH) ()

Phone number (AH) ()

Mobile phone

8. Email address *(if changed)* _____

PART B Authorisation

9. I request that my previous super fund (as named in Part C) transfer the total value held in respect of me in the fund to MilitarySuper:

- I understand that on payment by my previous super fund, I discharge that super fund from further liability in respect of the amount transferred.
- I approve the deduction of any appropriate exit fees from the amount transferred.

- I agree that in certain cases MilitarySuper may be required under Law to deduct tax from the untaxed portion of the Superannuation Lump Sum Payment (if any).
- I understand that the benefit will be allocated to MilitarySuper and invested in my nominated investment choice. If I have not nominated an investment choice, all transfers will be invested in the Growth (default) strategy.
- I understand that information contained in this form will be handled by the trustee and administrator of the MilitarySuper to process my transfer and that any personal information will be handled in accordance with the MilitarySuper Privacy Policy.
- I understand that I will receive confirmation once my money has been received into MilitarySuper.
- I acknowledge that I have been advised to read the PDS before completing this application form.

Your signature _____

Date

_____|_____|_____|_____|_____|_____|
 day month year

PART C *About your previous fund*

10. Name of previous fund _____

Previous fund membership
 number or policy number _____

Previous fund address _____

Previous phone number

(_____) _____

PART D *Information for previous super fund*

11. **Name of Scheme**

Military Superannuation and Benefits Scheme (MilitarySuper)

SFN: 258 536

ABN: 50 925 523 120

SPIN: CMS0103AU

Trustee

MilitarySuperannuation and Benefits Board of Trustees No1

ABN: 72 406 779 248

AFSL Number: 238 395

RSEL Number: L0000253

Compliance

MilitarySuper is a regulated super fund under the Superannuation Industry (Supervision) Act 1993. Accordingly, MilitarySuper can accept the rollover of both preserved and non-preserved benefits in accordance with the Superannuation Industry (Supervision) Act.

Payment Instructions:

- Cheques should be made payable to MilitarySuper – Account of (Member's name)
- Please forward the following to:

MilitarySuper
 PO Box 22
 Belconnen ACT 2616

- This Authority form
- The transfer cheque
- The Rollover Benefits Statement
- Any other associated documentation.

PART E *Privacy*

12. I do not want my contact details passed to Orima Research for the purpose of participating in research on the service provided by ComSuper.