

ANZ Australian Staff Superannuation Scheme

Rollover form

Roll other super money into your account in the ANZ Australian Staff Superannuation Scheme

Just fill in this form and send it back to ANZ Staff Super. It's that simple. We will contact your other fund(s) and look after all the transfer details. There is no charge from the ANZ Australian Staff Superannuation Scheme for this service. If you have more than one fund you want to transfer, you can photocopy this form. Your transfer will be processed faster if you attach a copy of a recent Member Statement from your previous super fund. Check the back of this form for more helpful notes about transferring.

If you need help

For assistance call ANZ Staff Super on **1800 000 086**.

Step 1 – Complete your personal details

Please print in black or blue pen,
in uppercase, one character per box.



Title Mr Mrs Ms Miss Other Date of birth / /

Given names

Surname

Residential address

Suburb State Postcode

Postal address (if different from above)

Suburb State Postcode

Daytime Telephone Mobile

Email

Membership number

Step 2 – Provide details of your previous super fund

Name of previous fund or policy

Address of previous fund

Suburb

State Postcode Telephone

Membership or policy number

Name of old employer who contributed to the previous fund

Date ceased employment with this employer / / Approximate value
\$



Protecting members' privacy

The Trustee, ANZ Staff Superannuation (Australia) Pty Limited, seeks to take all reasonable steps to protect members' privacy and the confidentiality of members' personal information.

The Scheme Administrator, Mercer, collects (on behalf of the Trustee) personal information directly from members and their employers. Sometimes information about you may be collected from other third parties such as a previous superannuation fund, your financial adviser or publicly available sources. We collect, use and disclose personal information about you to provide and manage your account in the Scheme and give you information about your super, or as required by super and tax laws.

If you do not provide the personal information requested or it is incomplete or inaccurate, we may not be able to manage your account properly and processing of transactions to, from or in relation to your account may be delayed.

Members' personal information is kept confidential, but may be disclosed by the Trustee or Scheme Administrator to third parties, such as the Scheme's actuary, insurer, medical consultants, underwriter, legal adviser and auditor and other external service providers who are contracted to assist with administering members' benefits. It may also be disclosed where expressly authorised or required by law, for example to government agencies such as the Australian Taxation Office and Superannuation Complaints Tribunal. Members' personal information may also be disclosed to the Group Superannuation Department of ANZ for the purposes of administering members' benefits or resolving members' inquiries or complaints.

Members' personal information may be disclosed to related entities of the Scheme Administrator located overseas (in particular, its wholly owned Global Operations Shared Services function in India) as part of the day-to-day provision of administration services.

The Trustee's Privacy Policy Statement contains more detail about how we deal with your personal information and information about how you can access and seek correction of information we hold about you. It also includes information about how you can lodge a complaint about how we've dealt with your personal information and how that complaint will be handled.

If you have any queries in relation to privacy issues, please contact:

ANZ Staff Super
GPO Box 4303
Melbourne VIC 3001
Telephone: 1800 000 086
Facsimile: 03 9245 5827
Email: anzstaffsuper@superfacts.com

The Trustee's Privacy Policy Statement is available on the Scheme's website www.anzstaffsuper.com or from ANZ Staff Super by calling 1800 000 086. You can also access the Scheme Administrator's privacy policy on the Scheme's website.



Step 3 – Sign the form

I request that you transfer the total value held in respect of me for the above super fund or policy to the ANZ Australian Staff Superannuation Scheme:

- I understand that on payment by my previous super fund, I discharge that super fund from any further liability in respect of the amount transferred
- I approve the deduction of any appropriate exit fees from the amount transferred subject to legislative restrictions
- I request that any further contributions received by my previous super fund after my payment, be redirected to my membership with the ANZ Australian Staff Superannuation Scheme
- I understand that I will receive confirmation once my money has been received in the ANZ Australian Staff Superannuation Scheme
- I understand that I have the right to ask my previous super fund for information that I reasonably require for the purpose of understanding any super entitlements I may have in that fund, including information about any fees and charges that may apply to the transfer and information about the effect of the transfer on any entitlements I have in my previous super fund. I confirm that I do not require such information from my previous fund
- I consent to my information being collected, disclosed and used in the manner set out in this form.

Signature

X

Date

/ /

Please return your completed form to: ANZ Staff Super
GPO Box 4303
Melbourne VIC 3001

Notes for previous superannuation provider

Name of Fund: ANZ Australian Staff Superannuation Scheme **SFN:** 129 796 941 **ABN:** 83 810 127 567

RSE Licence: L0000543 **Registration No:** R1000863

When transferring money in to ANZ Australian Staff Superannuation Scheme please note:

- the ANZ Australian Staff Superannuation Scheme is a regulated super fund under the Superannuation Industry (Supervision) Act 1993. Accordingly the ANZ Australian Staff Superannuation Scheme can accept the rollover of both preserved and non-preserved benefits in accordance with the Superannuation Industry (Supervision) Act
- cheques should be made payable to ANZ Australian Staff Superannuation Scheme – **Account of [member's name]**
- please forward:
 - this authority
 - the cheque
 - a Rollover Benefits Statement
 - other associated documentation to:

ANZ Staff Super
Reply Paid 4303
Melbourne VIC 8060

No need for a stamp just put all the relevant documentation in an envelope and mail to the above address.

