

**Do you have more than one super account? Are you doubling up on fees and charges?  
Complete this form to transfer your other super accounts into ESI Super and save!**

Please complete all sections of this form and attach the necessary documentation (as indicated on page 2) if you wish to transfer other superannuation accounts into ESI Super. You must complete a separate form for each fund transfer you are making.

**Please complete this form in BLOCK letters using blue or black pen.**

### ■ Your personal details

ESI Super member number (if known):

Surname:  Title: Mr  Mrs  Ms  Miss  Dr

Given names:  Date of birth: (DD/MM/YYYY)  /  /

Residential address:

State:  Postcode:

Postal address:

State:  Postcode:

Telephone (home):  Telephone (work):

Mobile:  Email:

Current employer:

**To help your other fund transfer your money into ESI Super more quickly, if possible, attach copies of your previous fund member statement(s).**

### ■ Details of old fund

Name (if different from above):

Name of previous fund where benefits held:  Value of benefit (approx.):

Name of previous fund administrator:

Address of previous fund administrator:

State:  Postcode:

Old fund membership number:  Telephone (if known):

Name of employer who contributed to the fund:

Date you left employer (if applicable): (DD/MM/YYYY)  /  /

## ■ How to invest your transfer

If you would like to invest your transferred amount differently to your current investment choice, please indicate your preferred investment option(s) below. Please note that this will only apply to this transfer.

| Investment option             | Percentage        |
|-------------------------------|-------------------|
| Cash Deposit*                 |                   |
| Cash Enhanced (formerly Cash) |                   |
| Stable                        |                   |
| Capital Managed               |                   |
| Balanced                      |                   |
| SRI Balanced                  |                   |
| Growth                        |                   |
| Australian Shares             |                   |
| International Shares          |                   |
|                               | <b>Total 100%</b> |

\*The Cash Deposit option was introduced on 17 December 2008. Please see ESI Super Member Guide for information about this investment option.

**Please note:** If you do not choose an investment option(s) or the total does not add up to 100%, your transfer will be invested in the investment option(s) previously chosen by you. If you have not made a previous investment choice it will be invested in the default option. For information on investment choice and your default option, read the ESI Super Member Guide.

## ■ Documentation required

You will need to provide documentation with this form to prove you are the person to whom the superannuation entitlements belong.

You will need to provide a **certified copy of one** of the following photographic documents:

- Current driver's licence issued under State or Territory law or equivalent authority of a foreign country
- Passport (current or expired within the last 2 years)
- A national identity card
- A card issued under a State or Territory law for the purpose of proving your age, which contains your photograph (e.g. 18+ card).

### OR

You will need to provide a **certified copy of one** of the following primary non photographic documents:

- Birth certificate or birth extract
- Citizenship certificate issued by the Commonwealth Government
- Pension card issued by Centrelink that entitles the person to financial benefits.

### AND

You will need to provide a **certified copy of one** of the following secondary documents:

- Letter from Centrelink regarding a Government assistance payment that contains your name and residential address within the preceding 12 months
- Letter from the Commonwealth or a State or Territory recording the provision of financial benefits that contains your name and residential address and was issued within the preceding 12 months
- Notice issued by a local government body or utilities provider that records the provision of services or utilities and contains your name and residential address that was issued within the preceding 3 months (e.g. rates notice, electricity bill, telephone bill)
- Notice issued by the Australian Taxation Office that records a debt payable to or by yourself to the Commonwealth under a Commonwealth law relating to taxation that was issued within the past 12 months that contains your name and residential address (e.g. Notice of Assessment).

## Have you had your name changed or are you signing on behalf of another person?

If you have changed your name or are signing on behalf of the applicant, you will need to provide a **certified** linking document. A linking document is a document that proves a relationship exists between two (or more) names (eg. a marriage certificate or a Power of Attorney).

### The following people can certify your documents:

- A person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner
- Judge of a court
- Magistrate
- CEO of a Commonwealth court
- Registrar or deputy registrar of a court
- Justice of the Peace (JP)
- Notary public
- A police officer
- An agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- A permanent employee of the Australian Postal Corporation with two or more years of continuous service who is employed in an office supplying postal services to the public
- Australian consular officer
- Australian diplomatic officer
- An officer with two or more continuous years of service with one or more financial institutions
- A finance company officer with two or more continuous years of service
- An officer, or an authorised representative with two or more continuous years of service with an Australian Financial Services License holder
- Member of the Institute of Chartered Accountants in Australia, CPA Australia or National Institute with two or more years of continuous membership.

The **certifying person** must confirm on the copies of the relevant document that they have sighted the originals. This authorisation can be provided by way of identifying themselves as belonging to one of the positions above, as well as a signature, date, stamp (if relevant) and membership number (if relevant).

**Please note:** *Faxed or emailed certifications will not be accepted, we must have the certifying authority's original signature on the copy received by ESI Super.*

## ■ Authorisation and declaration

I authorise ESI Super and my old fund (nominated on page 1) to exchange any information relevant to this transfer. I authorise ESI Super to have my benefits transferred into my ESI Super account and acknowledge that this notice is irrevocable. I understand that in authorising the transfer, I discharge my previous fund's Trustee of any further liability in respect of any amount once the benefit has been transferred to ESI Super. I authorise the deduction of transfer fees (if any) from the benefits transferred into ESI Super, subject to any legislative restrictions. After my super benefits have been transferred to my ESI Super account, I authorise the Trustee of my previous super fund to transfer contributions received by it to ESI Super.

I declare I have made my investment decision after careful consideration of my circumstances and the *Product Disclosure Statement* information made available by ESI Super's Trustee. I am aware that neither the Trustee nor its advisers have made any statements or undertakings as to the advisability of my transferring this benefit into ESI Super or the future performance of my chosen investment option(s).

I understand that if I do not choose an investment option(s) above, my transfer will be deposited in the investment option(s) previously chosen by me. If I have not made a previous choice, I understand that the money will be invested in the default option.

Member's signature:

Date: (DD/MM/YYYY)

Please return this completed form by mail to:

**ESI Super, GPO Box 959 Brisbane QLD 4001**

More information – Call **1300 363 240**. Email [super@esisuper.com.au](mailto:super@esisuper.com.au) or visit [esisuper.com.au](http://esisuper.com.au)

### Disclaimer

This document provides general financial product advice only and should not be relied on as legal or taxation advice, nor does it take the place of such advice. The financial product advice included in this document has been prepared without taking into account your individual objectives, financial situation or needs. Accordingly, before acting on the contents of this document, you should consider whether it is appropriate for your individual objectives, financial situation and needs. You should obtain a Product Disclosure Statement (PDS) from ESI Super and consider that document before making any decision to acquire any ESI Super products.

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