

# Roll in — Pension

Please complete this form in **CAPITAL** letters. Use this form to transfer other superannuation benefits to Smartsave Member's Choice Superannuation Master Plan.

**Questions?** Contact us on 1300 654 720 or [smartsave@onevue.com.au](mailto:smartsave@onevue.com.au).

Before transferring superannuation benefits to Smartsave Member's Choice Superannuation Master Plan, you should consider:

- ▶ exit fees
- ▶ benefits you may be losing, such as insurance
- ▶ costs
- ▶ investment performance
- ▶ whether you should seek professional advice.

## Checklist

- ▶ Have you completed all areas of this form?
- ▶ Have you signed and dated this form?
- ▶ Have you attached an original copy of certified identification to this form?
- ▶ Send your completed form to:  
Smartsave, PO Box 1282, Albury NSW 2640.

## 1. Personal details

Title	Given name(s)	
<input type="text"/>	<input type="text"/>	
Surname	Date of birth (DD/MM/YYYY)	
<input type="text"/>	<input type="text"/>	

## 2. Tax file number (TFN) (or exemption) \*

☐ I have already supplied my TFN

TFN	OR	Exemption reason
<input type="text"/>		<input type="text"/>

OR

☐ I do not wish to quote a TFN or exemption reason

\* In order to receive any tax concessions available in relation to your entitlement, you are required to quote your TFN. It is not compulsory to quote your TFN, however if your TFN is not quoted, the Trustee is obliged to deduct PAYG Tax from the relevant part of your benefit at the top marginal rate.

## 3. Contact details

Street address		
<input type="text"/>		
Previous address		
<input type="text"/>		
Phone (home)	Phone (work)	Mobile
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email		
<input type="text"/>		

## 4. Rollover fund details

a) Other Fund Member number	Fund name
<input type="text"/>	<input type="text"/>
Fund address (only needed if not sending directly to the Fund)	
<input type="text"/>	
Fund ABN or SFN	Unique Superannuation Identifier (USI)
<input type="text"/>	<input type="text"/>
Superannuation Product ID number (SPIN)	Fund telephone (only needed if not sending directly to the Fund)
<input type="text"/>	<input type="text"/>
b) Other fund Member number	Fund name
<input type="text"/>	<input type="text"/>

Fund address (only needed if not sending directly to the Fund)

Fund ABN or SFN

Unique Superannuation Identifier (USI)

Superannuation Product ID Number (SPIN)

Fund telephone (only needed if not sending directly to the Fund)

## 5. Transfer details

Full transfer amount

Partial transfer amount

## 6. Smartsave Member's Choice Superannuation Master Plan details

Fund name

Member number (for existing members only)

Australian Business Number

Unique Superannuation Identifier (USI)

Phone number

Fund address

## 7. Authority

Please mark with an X.

- ☐ I authorise the Trustee of Smartsave Member's Choice Superannuation Master Plan to obtain details and follow up the process of the transfer of funds from the fund indicated in Section 4 of this form.

## 8. Identification requirements

Please mark with an X.

For information on identification required, please refer to the Identification Requirements fact sheet available from the Secure Online Portal.

- ☐ A scanned original certified copy of identification is attached to this form. My adviser has reviewed and will hold all original copies of certified identification and can produce this if required by the Trustee of Smartsave Member's Choice Superannuation Master Plan or by law.

## 9. Declarations and signature

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

- ▶ I declare I have fully read this form and the information provided is true and correct;
- ▶ I am aware that I may ask my superannuation provider for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits, and do not require any further information;
- ▶ I discharge The Fund from, all further liability in respect of the benefits paid and transferred to The Fund by my previous superannuation provider; I request and consent to the transfer of superannuation as described in Section 4 of this form and authorise the superannuation provider of each fund to give effect to this transfer; and
- ▶ I declare that by nominating and authorising a Nominated Representative/Financial Adviser to act on my behalf that I release, discharge, and indemnify the Trustee and all the Trustee's successors and assigns from and against all losses, actions, liabilities, claims, demands, and proceedings arising from my appointment of such Appointed Nominated Representative/Financial Adviser and all acts, matters and things done or purported to be done by my Appointed Nominated Representative/Financial Adviser acting on my behalf even if not actually authorised by me.

Full name

Signature

Date (DD/MM/YYYY)

**Note:** this declaration must be signed by the Member, if my Nominated Representative/Financial Adviser is not authorised to act on my behalf to roll-in funds, to transfer funds, and to transact investments.

## Certificate of Compliance

Smartsave Member's Choice Superannuation Master Plan USI 43 905 581 638 001

ABN 43 905 581 638

Smartsave Member's Choice Superannuation Master Plan is a sub-plan of MAP Superannuation Plan, a superannuation fund established in accordance with the Superannuation Industry (Supervision) Act 1993 (SIS). The Trustee of this fund is Diversa Trustees Limited (ABN 49 006 421 638, RSE Licence Number L0000635, AFSL 235153).

We certify that:

- ▶ the trustee has lodged an irrevocable election for the fund to be a regulated superannuation fund within the meaning of Section 19 of SIS.
- ▶ the fund will be administered as a complying superannuation entity for the purposes of SIS. The trustee has not received a notice of non-compliance from the Australian Prudential Regulation Authority.
- ▶ the Australian Prudential Regulation Authority has not directed the fund not to accept contributions or rollovers under Section 63 of SIS.

### Company Secretary

Diversa Trustees Limited

### Adviser declaration

- ▶ I confirm that the Member has provided an original certified authorisation for myself as their Nominated Representative to act on their behalf to roll-in funds, to transfer funds, and to transact investments.
- ▶ I have provided the Member with access to the current product disclosure statement (PDS) and other disclosure documents for their selected investments as outlined in the PDS.
- ▶ I have provided a copy of a Statement of Advice, and hold an authority to proceed from the Member, including details of approved investment strategies, and investments to be purchased, which can be produced should it be required by the Trustee of Smartsave Member's Choice Superannuation Master Plan and/or as required by law.
- ▶ I confirm I abide by and meet all current AML/CTF requirements and can provide the original certified copy of identification documents as required by the Trustee and/or by law.
- ▶ I release, discharge, and indemnify the Trustee and all the Trustee's successors and assigns from and against all losses, actions, liabilities, claims, demands, and proceedings arising from my appointment as the Member's nominated representative, and all acts, matters and things done or purported to be done by me acting on the Member's behalf even if not actually authorised by the Member (applicant).

Adviser full name

Signature

Date (DD/MM/YYYY)

Please return completed and signed form to: Smartsave, PO Box 1282, Albury NSW 2640.

### Contact us

**Phone:** 1300 654 720 | **Email:** [smartsave@onevue.com.au](mailto:smartsave@onevue.com.au) | **Website:** [smartsavesuper.com.au](http://smartsavesuper.com.au)

Smartsave Employer Super and Smartsave Personal Choice and Smart Pensions are part of the Smartsave Member's Choice Superannuation Master Plan ABN 43 905 581 638 RSE R1001341 (Fund). Diversa Trustees Limited ABN 49 006 421 638, AFSL 235153. RSE Licence L0000635 (Trustee) is the Trustee of the Fund and the product issuer. The information in this document has been prepared by OneVue Wealth Services Ltd ABN 70 120 380 627 AFSL 308868 as the Fund Promoter. It is intended to provide you with general information only and does not take into account your personal objectives, financial situation or needs. Before making any financial decisions about Smartsave Employer Super and Smartsave Personal Choice & Smart Pensions, it is important that you read the current product disclosure statement (PDS) relevant to your membership and consider your particular circumstances and whether the particular financial product is right for you. The current PDS for each product is available on [smartsavesuper.com.au](http://smartsavesuper.com.au). You should consult a financial adviser if you require personal advice.

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