



# Application to transfer preserved benefit

## Important information about this form

### Who should use this form?

Use this form if you are a serving Australian Defence Force (ADF) member and you wish to transfer your preserved Member and/or Ancillary benefit from MilitarySuper.

### Before you use this form

Before completing this benefit application form, it is recommended you read the **MilitarySuper Product Disclosure Statement (PDS)**, available on our website [csc.gov.au](https://csc.gov.au). If you require further assistance please contact our Customer Information Centre on **1300 006 727**. We recommend you contact the receiving superannuation fund prior to submitting this application to MilitarySuper.

### Completing this form

Complete:

**Part A** – About yourself

**Part B** – Member benefit option

**Part C** – Ancillary benefit option

**Part D** – Surcharge

**Part E** – Identification requirements

**Part F** – Tax File Number

**Part G** – Member declaration

**Part H** – Privacy

**Part I** – Lodgement

### Benefit options

As a serving member of the ADF you have the option to rollover your preserved Member and/or Ancillary benefit to ADF Super, a regulated superannuation fund of your choice or a Retirement Savings Account (RSA).

### Rollover fund nominations

Please ensure your nominated rollover account is active and can receive deposits from other Superannuation funds. Failure to do so will result in the payment being returned to our office.

If you do not elect to rollover your funds to ADF Super, it must be paid into a complying superannuation fund, rollover fund or Retirement Savings Account (RSA). We will not deduct tax from any amount rolled over to another fund. However, the receiving fund will deduct 15% tax from any untaxed component of the rollover.

You can nominate two rollover funds or RSAs to receive all or part of your benefit. Complete one nomination if you are going to rollover your entire benefit to one fund. If you are going to split the amount, complete both nominations with details of the second fund.



Military  
Superannuation &  
Benefits Scheme

About this form continued on next page

We will make all rollover payments directly to your nominated rollover fund(s). Please make sure you have the correct postal address for the fund(s).

When completing this section you must include the name and Australian Business Number (ABN) for the nominated rollover fund or RSA. If you have a membership number (known as your Member Client Identifier) and a Unique Superannuation Identifier (USI) for the rollover fund or RSA, please include these numbers.

If you do not have these numbers, you can get them from the rollover fund or RSA. If you don't include these details, it could result in payment delays of your benefit.

## Surcharge debt

If you have a superannuation contribution surcharge debt, it will be deducted from your benefit before payment. Interest will also be applied to the surcharge debt until the debt is fully paid.

You have the option to:

- have the debt deducted from your Member benefit before it is rolled over to your elected superannuation fund
- have the debt deducted from your Ancillary benefit before it is rolled over to your elected superannuation fund
- or
- defer the surcharge debt, this is only applicable if you have benefits remaining in MilitarySuper. If you elect to defer your surcharge debt, it will attract interest. You can make payments against the debt at anytime by completing the **DFRDB and MilitarySuper member contributions surcharge remittance advice (SUR-DM1)** form available at [csc.gov.au](http://csc.gov.au)

## Payment

Rollover payments are normally paid within 15 working days after receiving your application or after the date we receive all necessary documentation to enable us to process your application, whichever is the later.

## Your Tax File Number (TFN)

We are required to deduct PAYG tax at the Top Marginal Rate plus the Medicare levy from benefits if a person does not provide a Tax File Number (TFN).

We are required to validate your TFN with the Australian Tax Office (ATO) records to confirm the TFN provided is yours and is correct. Your TFN can be validated using the SuperTICK validation service at any time during your MilitarySuper membership. For example, validation may occur upon entry or re-entry to the scheme and must be validated before your benefit can be rolled over to another fund. If you do not provide your TFN, the processing of your benefit payment may be delayed.

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

## How to use this form

Please use CAPITAL LETTERS and a black or blue pen.

Mark boxes like this ☐ with a ✓ or ✗ then fill out the next question or section.

## Submitting your form

Send your completed application and attachments to:

**MilitarySuper**  
**GPO Box 2252**  
**Canberra ACT 2601**  
**Australia**



ADFC-  
MIL  
02/23

# Form start

**Read each section of the form carefully before filling it in.**



## Provide your personal details

Service

☐ Navy ☐ Army ☐ RAAF

Service number

[illegible]

## Salutation

☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other

Surname

[illegible]

Given name(s)

[illegible][illegible]

Previous name  
(if changed name)

[illegible]

Date of birth

D	D	M	M	Y	Y	Y	Y

## Contact details

[illegible]

AFTER HOURS							

MOBILE NUMBER					



## Military Superannuation & Benefits Scheme

 Section A continued on next page

[illegible]

RESIDENTIAL															

SUBURB										STATE			POSTCODE		

WORK	
@	

HOME	
@	

## Member benefit option

- ## Rollover fund details

[illegible][illegible][illegible]

UNIQUE SUPERANNUATION IDENTIFIER																			

THIS TRANSFER CANNOT BE PROCESSED WITHOUT THE USI NUMBER

[illegible][illegible]☐ Whole balance

\$ 

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☐ Preserve Ancillary benefit in MilitarySuper

☐ Rollover Ancillary benefit to ADF Super

☐ Rollover Ancillary benefit to a regulated superannuation fund of your choice

☐ Yes – continue to **Part D**

☐ No – Please complete the rollover fund details below

## ADFC-MIL 5 of 9

## D Surcharge

If you have a superannuation contributions surcharge debt, please elect one of the following:

- ☐ Retain as a debt against your preserved benefit  
Please note: The surcharge debt will attract interest.  
You can make payments against the debt at anytime.
- ☐ Deduct from Member benefit (if claiming)
- ☐ Deduct from Ancillary benefit (if claiming)

## E Identification requirements

To confirm your identity, we require some information from you—this is to protect your benefit against fraud, money laundering and terrorism financing, under the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*.

### Verifying your documents

Identifying documents may be verified through the Document Verification Service (DVS). DVS is a national online system that allows approved government agencies and organisations to compare a member's identifying information with a government record. It is not a database and does not store any personal information. Requests to verify a document are encrypted and sent via a secure communications pathway to the document issuing authority for checking.

**If you don't provide authorisation to have documents verified electronically or your documents are incompatible with DVS, you will need to provide certified copies of required documents. Please also refer to the section Certifying your documents.**

An electronic copy of your identification documents will be stored in a secure environment and hard copies will be securely stored off-site. All copies will only be used for the purpose of confirming your identity. You need to send in identification with every application.

DVS is only compatible with some identification documents, these have been listed below.

### Certifying your documents

If you're providing certified documents, the certifying authority must confirm in writing you are the valid holder of the identification you are presenting, and any copies are true copies of the original.

**\* IMPORTANT:** The certification must include the name, signature, qualification and registration number of the certifying authority (if applicable), and the date of the certification.

The following sample of certifying authorities can certify your documents in Australia:

- Dentist
- Employee of a Commonwealth authority engaged on a permanent basis with five or more years of continuous service who is not specified elsewhere in this document
- Financial Adviser or Financial Planner
- Justice of the Peace (JP)
- Legal Practitioner
- Medical Practitioner
- Member of the Australian Defence Force who is:
  - an Officer; or
  - a Non-Commissioned Officer within the meaning of the *Defence Force Discipline Act 1982* with five or more years of continuous service; or
  - a Warrant Officer within the meaning of that Act.
- Midwife
- Notary Public
- Nurse
- Occupational therapist
- Physiotherapist
- Psychologist.

**Please note:**  
We require a copy of both sides of your identification document.

For a full list of certifying authorities refer to **Schedule 2** of the *Statutory Declarations Regulations 2018* available at [www.legislation.gov.au/Details/F2018L01296](http://www.legislation.gov.au/Details/F2018L01296)

## How can I meet the identification requirements?

You only need to provide **one** document from the **Primary photographic identification** category. If you can't provide any **Primary photographic identification** you will need to provide **one** secondary identification document from List A AND **one** secondary identification document from List B. We can only accept documents that are listed below for identification purposes.

If the name we hold on file for you is different to the name on your identification, or two pieces of identification are in different names, please provide a certified copy of your **Marriage** or **Change of Name certification**.



**If you would like us to use DVS to verify your identification, please provide authorisation by placing a check in the box below.**



☐




I confirm that I am authorised to provide the personal details presented and I consent to the information being checked with the document issuer or official record holder via third party systems for the purposes of confirming my identity.



**You must provide a copy\* of one of the following:**

### Primary photographic identification

DVS compatibility is shown as  or 




-  A current Australian Driver's Licence (front and back of licence must be provided).
-  A current Australian Passport (or one which has expired within the last two years).
-  A current Australian Proof of Age card (issued under a State or Territory law).

If your documents are incompatible with DVS, don't forget to provide certified copies.




### Secondary identification requirements

Only provide these documents if you're unable to provide **one** of the **Primary photographic identification** documents.

#### List A

-  Your Australian Birth Certificate or extract issued by a State or Territory.  
**Please note:** Birth Certificate extracts and Birth Certificates issued before 1970 may not be verified by DVS.
-  Your Citizenship Certificate issued by the Commonwealth.
-  Your current Pensioner Concession Card issued by the Department of Human Services.

#### List B

-  Your notice issued by the Australian Taxation Office (ATO) within the last 12 months that shows your name, current residential address, and records an amount payable either to or from the ATO.
-  Your notice issued by a local council or utilities provider in the last three months showing the provision of services and current residential address. **For example:** rates notice, electricity or water bill.
-  Your notice issued by the Commonwealth or a State or Territory government within the last 12 months showing your name and current residential address, and the provision of a financial benefit. **For example:** a Centrelink letter.

### Certifying your documents overseas

If you live overseas and need to have documents certified, it needs to be done by a person in a foreign country who is authorised by law in that jurisdiction to administer oaths or affirmations or to authenticate documents. For more information refer to [ag.gov.au](http://ag.gov.au) and [dfat.gov.au](http://dfat.gov.au). Documents provided in a foreign language must be accompanied by a certified translation completed by an accredited translator.

Persons residing overseas and foreign residents may need to contact us.

**\*Don't send original documents.**



## Tax File Number

CSC is authorised to collect your TFN, which will only be used for lawful purposes.

These purposes may change in the future as a result of legislative change. We may disclose your TFN to another superannuation provider when your benefits are being transferred, unless you request in writing that your TFN not be disclosed to any other superannuation provider.

We are required to validate your TFN with the ATO's records to confirm the TFN provided is yours and is correct. Your TFN can be validated using the SuperTICK validation service at any time during your MilitarySuper membership and must be validated before your benefit can be rolled over to another fund.

If you do not provide your TFN, the processing of your benefit payment may be delayed.

It is not an offence not to quote your TFN. However, giving us your TFN will have the following advantages (which may not otherwise apply):

- we will be able to accept all types of contributions (subject to scheme rules)
- the tax on contributions to your superannuation account/s will not increase
- other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your superannuation benefits
- it will make it much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

If you have already provided your TFN to us, you are under no obligation to provide it again in this application.

Your Tax File Number

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Your TFN remains confidential



## Declaration

I declare that the information I have provided is true and correct to the best of my knowledge.

I acknowledge that it may be a criminal offence to knowingly provide false or misleading information or documents.

I understand that if all the required information has not been provided, this application may be returned to me for completion and payment may be delayed.



**Sign**

SIGNATURE

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Date signed

D	D	/	M	M	/	Y	Y	Y	Y



## Privacy

☐ I do not want my contact details passed to an independent firm for the purpose of participating in research on the service provided by MilitarySuper.

Personal information that you or a third party provide, such as your employer, is collected, held, used and disclosed as required or authorised by law in accordance with the privacy policies and notice, available via [csc.gov.au](http://csc.gov.au) or by contacting us on **1300 006 727**, for the purpose of managing your super. This includes the management of superannuation investments, providing superannuation products and information, the administration of accounts, conducting market research and product development. The privacy policies and notice contain important information about how personal information is handled, including rights to access and update that information and how a complaint about a breach of privacy can be made.



Section E continued on next page



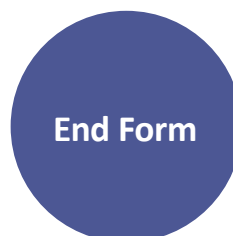


# Lodgement

**You have now completed this form.**

Send your completed application and attachments to:

**MilitarySuper**  
**GPO Box 2252**  
**Canberra ACT 2601**  
**Australia**



End Form



Need assistance?  
Call us on the phone  
numbers below



**Email**  
[members@enq.militarysuper.gov.au](mailto:members@enq.militarysuper.gov.au)



**Phone**  
1300 006 727



**Fax**  
(02) 6275 7010



**Post**  
MilitarySuper  
GPO Box 2252  
Canberra ACT 2601



**Web**  
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