



Application to Pay in a Transfer Amount

Important information about this form

Get the facts first

Before completing this form, please read the **MilitarySuper Product Disclosure Statement (PDS)**, as well as the Transfer Amounts factsheet which is available from the MilitarySuper website militarysuper.gov.au

Who should use this form?

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

When to use this form

Use this form:

- **To transfer other superannuation money you have.** Complete this form and **send it to your previous superannuation fund.** If you have superannuation with more than one previous superannuation fund you will need to complete a separate form for each superannuation fund. Once your previous superannuation 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.



Military
Superannuation &
Benefits Scheme

➡ About this form continued on next page

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.

We are required to validate your TFN with the ATO's records to confirm the TFN provided is yours and correct. Your TFN will be validated before your benefit will be paid using the SuperTICK validation service. 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 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
GPO Box 2252
Canberra ACT 2601
Australia

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).

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

Please forward this authority form, the transfer payment, the Rollover Benefits Statement and any other associated documentation to:

MilitarySuper
GPO Box 2252
Canberra ACT 2601
Australia



Application to Pay in a Transfer Amount

Form start

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

A About yourself

1. Service Navy Army RAAF

2. Scheme MilitarySuper DFRDB

3. Service number/Employee ID

4. Salutation Mr Mrs Ms Miss Other

Surname

Given name(s)

5. Date of birth / /

6. Postal address

SUBURB STATE POSTCODE

7. Phone number

BUSINESS HOURS

AFTER HOURS

MOBILE NUMBER

8. Email address

@



Military
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B Authorisation

9. I request that my previous superannuation 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 superannuation fund, I discharge that superannuation 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 Balanced (default) strategy.
 - I understand that information contained in this form will be handled by the trustee and administrator of 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.

 **Sign**

SIGNATURE

Date signed

D	D	/	M	M	/	Y	Y	Y	Y
<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

C About your previous fund

10. Name of previous fund

Previous fund membership number or policy number

Previous fund address

SUBURB STATE POSTCODE

Previous fund phone number

D Document Checklist

11. When you lodge this form, please provide the following document:
- Certified copies of documents to prove your identity.**
Please contact your previous superannuation fund to confirm identification requirements they require to process your application.

E

Information for previous superannuation fund

12. Name of scheme

Military Superannuation and Benefits Scheme (MilitarySuper)

SFN: 258 636 942

ABN: 50 925 523 120

Unique Superannuation Identifier (USI): 50925523120001

Trustee

The Commonwealth Superannuation Corporation

MilitarySuperannuation and Benefits Board of Trustees No1

ABN: 48 882 817 243

AFSL Number: 238 069

RSEL Number: L0001397

Compliance

MilitarySuper is a regulated superannuation 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 1993*.

F

Privacy

13. I do not want my contact details passed to a commissioned independent research 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 militarysuper.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.

You have now completed this form.

Payment Instructions:

Please forward this authority form, the transfer payment, the Rollover Benefits Statement and any other associated documentation 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



Phone
1300 006 727



Fax
(02) 6275 7010



Post
MilitarySuper
GPO Box 2252
Canberra ACT 2601



Web
csc.gov.au



Overseas Callers
+61 2 6275 7000