

combining your super into HESTA

HESTA

Complete the *rollover initiation request* overleaf to transfer your super benefits from another fund to HESTA

Before completing this form

- Read the important information below.
- Complete and return the *Choice of super fund request* form to your employer if you would like HESTA to receive future Superannuation Guarantee contributions.
- You can also find and rollover any other super online at hesta.com.au/login

When completing this form

- Type in information or if writing use CAPITAL LETTERS.

After completing this form

- Sign the authorisation.
- Scan and email, or mail the request form.

! Important information

This transfer may close your account (you will need to check this with your FROM fund).

This form **cannot** be used to:

- transfer your super if you don't know where it is
- transfer your super from multiple funds on this one form – a separate form must be completed for each fund you wish to transfer super from
- transfer your super to an SMSF or APRA fund
- change the fund to which your employer pays contributions on your behalf. The *Choice of super fund request* form must be used by you to change funds
- open a superannuation account, or
- transfer benefits under certain conditions or circumstances, for example if there is a super agreement under the *Family Law Act 1975* in place.

What happens to my future employer contributions?

Using this form to transfer your super will not change the fund to which your employer pays your contributions and may close the account you are transferring your super FROM.

If you wish to change the fund into which your contributions are being paid, you will need to speak to your employer about choice.

For the appropriate forms and information about whether you are eligible to choose the fund to which your employer contributions are made, visit ato.gov.au or call 13 10 20.

Important things you need to consider when transferring your super

When you transfer your super, your entitlements under that fund may cease. You need to consider all relevant information before you make a decision to transfer your super. If you ask for information, your super provider must give it to you. Some of the points you should consider are:

- differences in fees and costs funds charge can have a significant effect on what you will have to retire on. For example, a 1% increase in fees and costs may significantly reduce your final benefit.
- death and disability benefits – your FROM fund may insure you against death, illness or an accident which leaves you unable to return to work. If you choose to leave your current fund, you may lose any insurance entitlements you have. Other funds may not offer insurance or may require you to pass a medical examination before they cover you. When considering a new fund, you should check the costs and amount of any cover offered.

Things you need to know

We are authorised to collect your tax file number (TFN) under the *Superannuation Industry (Supervision) Act 1993*. Supplying your TFN is voluntary, and it is not an offence if you choose not to provide it. But if you don't, you may end up paying more tax than you need to. You must supply your TFN to enable your HESTA account to accept after-tax contributions.

We are required by law to take the necessary steps to properly safeguard your TFN, and our intention is to use it only for lawful superannuation purposes, including to facilitate the search for and consolidation of your superannuation accounts, by seeking information from the Australian Taxation Office (ATO) and/or a superannuation entity.*

A record of your TFN will be made for ongoing taxation and superannuation purposes. We may disclose your TFN to another superannuation provider if your benefits are transferred, unless you instruct us in writing not to disclose it to any other fund.

*Please note: Future legislation may result in changes to these purposes.

Why should I provide my TFN?

HESTA will be able to accept all permitted types of contributions to your account.

Other than the tax that may ordinarily apply, you will not pay more tax than you need to – this affects both contributions to your superannuation and benefit payments when you start drawing down your superannuation benefits, and it will make it much easier to find different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

You can change your married name online

All you need to do is log in to your online account then click on **Profile** and navigate to **Change your name**.

You will be asked to verify some personal details, provide your Australian marriage certificate and then you can enter your married surname – and you are done!

Have you changed your name 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. The following table contains information about suitable linking documents.

Purpose	Suitable linking documents
Change of name	Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office
Signed on behalf of the applicant	Guardianship papers or Power of Attorney

Return your completed and signed form to hesta@hesta.com.au or mail to: HESTA, Locked Bag 35007, Collins St West VIC 8007.

If you have any questions about completing this form, call us on 1800 813 327 between 8.00am and 8.00pm (AET) Monday to Friday.

contact us

hesta@hesta.com.au | 1800 813 327 | Locked Bag 35007, Collins St West VIC 8007 | hesta.com.au

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rollover initiation request



Use this form if you would like to request a transfer of your super account from another fund to HESTA.
Type in your details or complete in pen using CAPITAL LETTERS. Print 'X' to mark boxes where applicable. **The form must be completed in full.**

Personal details

Member number

*Date of birth

D

D

M

M

Y

Y

Y

Y

*Given names

*Family name

Mobile or daytime phone number

We are authorised by law to ask for your TFN. You do not have to provide it but if you don't, you may end up paying more tax than you need to. See Why we ask for your TFN at hesta.com.au/tfn for further details.

MY TFN is:

*Residential address (PO Box not accepted)

*State/Terr.*Postcode

Postal address (only complete if different from above)

*Suburb

*State/Terr.*Postcode

Fund details

FROM 1 (Other fund)

The trustee of your FROM fund may request further information/evidence from you to help confirm your identity.

*Fund name

Fund phone number

*Member or account number

Australian Business Number (ABN)

Unique Superannuation Identifier (USI)

TO (Receiving fund)

*Fund name

HESTA

Fund phone number

1800 813 327

*Membership or account number

Australian Business Number

64 971 749 321

Unique Superannuation Identifier

HST0100AU

or FROM 2 - Self-managed super fund (SMSF)

*Account name (this must be the same as the SMSF)

Australian Business Number (ABN)

Electronic Service Address (ESA)

Type of rollover

Full rollover

Partial rollover

Transfer amount (only complete for partial rollovers)

\$

! Important

Your transfer will be rejected if the details on this form don't match the ATO's records. Before you submit this form, contact the ATO to check the following details are recorded with them: Your full name, date of birth, TFN, your SMSF's name, ABN and bank account details, you have an active ESA for your SMSF

A separate form must be completed for each fund you wish to transfer super from.

Authorisation

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

- I declare I have fully read this form and the information completed is true and correct.
- I am aware I should ask my superannuation provider for information about the effect this transfer may have on my benefits, and have obtained or do not require any further information.
- I consent to my tax file number being disclosed for the purposes of consolidating my account.
- I request and consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect to this transfer.
- I have read and understood HESTA's Privacy Collection Statement which is available at hesta.com.au/privacy or by calling 1800 813 327. I consent to my personal information being collected and used by the Trustee for the ongoing administration of my membership by the fund administrator and other service providers.

*Name (Print in BLOCK LETTERS)

*Signature

*Date

D

D

M

M

Y

Y

Y

Y

NB: *Denotes mandatory field. If you do not complete all of the mandatory fields, there may be a delay in processing your request