



# A guide to rolling part of your account balance into Hostplus Executive.

September 2016

By completing this form, you're requesting the transfer of the **partial** balance of your superannuation benefits to Hostplus. This form **cannot** be used to transfer the entire balance of your superannuation benefits. This form will **not** change the fund to which your employer pays your contributions. The standard choice form must be used by you to change funds.

## How to transfer.

### Before completing the Request to transfer form:

Please ensure you read the important information below.

### When completing the Request to transfer form:

- Refer to these instructions where a question shows a message like this: **i**
- Print clearly in BLOCK letters.

### After completing this form:

- Sign the authorisation
- Send the Request to transfer form to Hostplus.

---

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

The Request to transfer form **cannot** be used to:

- transfer the entire balance of your superannuation benefits – if you'd like to roll your entire balance into Hostplus, use the Request to transfer your entire account balance into Hostplus form
  - transfer benefits if you don't know where your superannuation is
  - transfer benefits from multiple funds on the one form – a separate form must be completed for each fund you wish to transfer superannuation from
  - change the fund to which your employer pays contributions on your behalf
  - open a superannuation account, or
  - transfer benefits under certain conditions or circumstances, for example if there is a superannuation agreement under the Family Law Act 1975 in place.
- 

## What happens to my future employer contributions?

Using the Request to transfer form to transfer your benefits will not change the fund to which your employer pays your contributions and may close the account you are transferring your benefits **from**.

If you wish to change the fund into which your contributions are being paid, you will need to speak to your employer about Super Choice. For the appropriate forms and information about whether you are eligible to choose the fund to which your employer contributions are made, visit [www.superchoice.gov.au](http://www.superchoice.gov.au) or call the Australian Taxation Office on 13 10 20.

## Things you need to consider when transferring your superannuation.

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

- Fees – your **from** fund must give you information about any exit or withdrawal fees. If you are not aware of the fees that may apply, you should contact your fund for further information before completing the form. The fees could include administration fees as well as exit or withdrawal fees. The differences in fees that different funds charge can have a significant effect on what you will have to retire on. For example, a 1% increase in fees 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. Hostplus may not offer the same insurance so it's important that you check the costs and amount of cover offered.
- If you have insurance cover through another Super Fund, you may be able to transfer your cover to Hostplus. To apply to transfer your existing insurance cover to Hostplus, please complete the Insurance Transfer Form.

## What happens if I do not quote my Tax File Number (TFN)?

If you do not provide your TFN, contributions made to your account may be taxed at the highest marginal tax rate plus the Medicare levy, compared to the concessional tax rate of 15%. Hostplus may deduct this additional tax from your account.

If we do not have your TFN, you will not be able to make personal contributions to your Hostplus account. Choosing to quote your TFN will also make it easier to keep track of your superannuation in the future.

Under the Superannuation Industry (Supervision) Act 1993, Hostplus 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. The TFN may be disclosed to another superannuation provider, when your benefits are being transferred, unless you request in writing that your TFN is not to be disclosed to any other trustee.

#### **Your privacy.**

Hostplus is seeking to collect personal information from you today so that we can transfer your superannuation to us. The personal information we are seeking to collect from you is your name, address, date of birth, Tax File Number (TFN) and contact details. We need to collect the requested personal information from you to give effect to your transfer instruction. If you do not provide us with this information, we may not be able to carry out these instructions.

The Hostplus privacy policy is available on the Hostplus website at [www.hostplus.com.au/privacy](http://www.hostplus.com.au/privacy) and includes information about how you may access and seek correction of your personal information as well as how you can make a complaint about a breach of your privacy.

Hostplus usually discloses your personal information to our administrator Superpartners, mail houses and the ATO. Superpartners may disclose your personal information to overseas recipients. Please see the Superpartners Privacy Policy at [www.superpartners.com.au](http://www.superpartners.com.au) for further information.

#### **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
<b>Change of name</b>	<ul style="list-style-type: none"><li>• Marriage certificate</li><li>• Deed poll or change of name certificate from the Registry of Births, Deaths and Marriages</li></ul>
<b>Signing on behalf of a member</b>	<ul style="list-style-type: none"><li>• Power of Attorney</li><li>• Guardianship papers</li></ul>

#### **Where do I send the form?**

You can send your completed and signed form to:

Hostplus  
Reply Paid 84069  
Carlton South VIC 3053

#### **Checklist.**

- Have you read all the information?
- Have you considered where your future employer contributions will be paid?
- Have you completed all of the mandatory fields on the Request to transfer form?
- Have you signed and dated the form?



Office use only

# Rolling part of your account balance into Hostplus Executive.

September 2016

### Completing this form

- Read A guide to transferring your entire account balance into Hostplus
- Refer to instructions where indicated with a **i**
- Complete all fields marked with an asterisk (\*).

### After completing this form

- Sign the authorisation
- Send form to: Hostplus, Reply Paid 84069, Carlton South VIC 3053

## 1 Personal details.

Title	Please specify				Gender*		
<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Ms	<input type="checkbox"/> Dr	<input type="checkbox"/> Other	<input type="checkbox"/> Male	<input type="checkbox"/> Female	
Given name*							Middle initials/*
Surname*							
Other/previous names							
My Tax File Number is:*			Phone number			Date of birth*	

**i** See 'What happens if I do not quote my Tax File Number?' Under the Superannuation Industry (Supervision) Act 1993, you are not obliged to disclose your Tax File Number, but there may be tax consequences.

## 2 Residential details.

Street address*											
Suburb						State			P/C		

**i** If you know that the address held by your **from** fund is different to your current residential address, please give details below.

Previous address											
Suburb						State			P/C		

### 3 Fund details.

Where are you rolling from?

Fund name\*

Member or account number

Fund ABN

Fund telephone number\*

Unique Superannuation Identifier (USI)\*

**i** If you have multiple account numbers with this fund, you must complete a separate form for each account you wish to transfer.

Where are you rolling to?

Fund name\*

HOSTPLUS EXECUTIVE SUPERANNUATION

Member or account number\*

Fund ABN

Fund telephone number

Unique Superannuation Identifier (USI)

How much are you rolling over?

### 4 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 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 consent to my tax file number being disclosed for the purposes of consolidating my account
- I discharge the superannuation provider of my **from** fund of all further liability in respect of the benefits paid and transferred to Hostplus

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.

Name\* (Print in BLOCK letters)

Signature of applicant\*

Date\*

**!!!** Faxed, scanned or photocopied forms cannot be processed. However, you may use photocopies of a blank form. You must complete a separate transfer form for every fund and every account within that fund that you are transferring from.

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

**✉** When you have completed this form please send it to: **Hostplus, Locked Bag 3, Carlton South VIC 3053**

#### To the trustee of the old fund.

Statement of Compliance – Superannuation Industry (Supervision) Act 1993  
The trustee of the Hostplus superannuation fund, Host-Plus Pty Limited, certifies that:

- the fund is a Resident Superannuation Fund under the above act, and that
- we have no reason to believe that the fund will not comply with the above Act and Regulations, and that
- the fund is not subject to a direction from the Australian Prudential Regulation Authority which prohibits the trustee from accepting employer contributions.

#### Payment instructions.

Please make the cheque payable to: 'Hostplus' – followed by your name.

Send the cheque and transfer payment details and any surcharge information to: Hostplus, Locked Bag 3, Carlton South VIC 3053.