



# Transfer your super to another fund

Use this form to transfer some or all of your super.

Before you start...

Fill this form out in **BLOCK** letters using a black or blue pen. Write 'X' to mark boxes.

- + To keep your account open, you need to leave a balance of at least \$5,000.
- + Remember to sign the form. We can't act on this form if it's not signed.
- + If you make a mistake cross it out and initial the change. Don't use liquid paper or whiteout.
- + Read the **Product Disclosure Statement** for more information.
- + Before making a decision to change funds, make sure you don't lose important benefits, such as insurance, or suffer extra costs. See our **Thinking of changing super funds?** fact sheet at [mine.com.au/super-factsheets](http://mine.com.au/super-factsheets)

**1. Your personal details**

Member number  
.....

Mr  Ms  Mrs  Miss  Dr  Other       Male  Female

Given names

Surname       Date of birth (DD-MM-YYYY)   -   -

Residential address

Suburb       State         Postcode

Postal address. If the same as your residential address, mark 'X' in this box

Suburb       State         Postcode

Mobile phone       Home phone       Work phone

Preferred email       Other email

Date left work (DD-MM-YYYY) (if applicable)   -   -

**2. How much do you want to transfer?**

Mark 'X' at the amount you want to transfer.

Full account balance. If we still receive super contributions from your employer into your account, your full account balance transfer may be delayed.

Partial transfer of \$  You must leave a minimum balance of \$5,000 in your Mine Super account to keep it open.

Amount in words

Turn over to finish filling out this form...



### 3. Where do you want your super transferred to?

Other fund's full name and address

Other fund Superannuation Product Identification Number (SPIN)

Australian Business Number (ABN)

Unique Superannuation Identifier (USI)

Membership or account number

### 4. Self managed super fund payment details

- + Only complete this section if you're transferring to a self managed super fund (SMSF).
- + SMSFs will only be paid by direct credit, not cheque. The bank account name you nominate must be in the name of the SMSF.



#### You need to attach:

- + a copy of the top part of your SMSF bank statement, that's less than 12 months old, from your financial institution. The statement must show the account name, BSB and account number of the account you're transferring your super to
- + certified identification if you haven't previously provided this.

Institution's name

Branch location

BSB number

Account number

SMSF account name

Australian Business Number (ABN)

### 5. Which investment option would you like to make your transfer from?

- + Only fill in this section if you're making a partial transfer and you're invested in **more than one investment option**.
- + If you don't choose, the transfer will be taken pro-rata across all your investment options, except the Term Deposit Transaction Account.
- + If insufficient funds remain in your chosen investment option, the transfer will be taken pro-rata across the remaining options, except the Term Deposit Transaction Account. No money will be deducted from Term Deposit investments or the Term Deposit Transaction Account.

#### Pre-mixed strategies

Aggressive	\$	<input type="text"/>
Growth	\$	<input type="text"/>
Balanced	\$	<input type="text"/>
Stable	\$	<input type="text"/>

#### Asset class options

Australian Shares	\$	<input type="text"/>
International Shares	\$	<input type="text"/>
Property	\$	<input type="text"/>
Bonds	\$	<input type="text"/>
Cash	\$	<input type="text"/>

### 6. Member declaration for payment

- + I certify the information I've provided is true and correct.
- + I authorise the Trustee of Mine Super to submit to the Australian Taxation Office (ATO) and the nominated transfer fund all relevant details of my payment in accordance with ATO reporting requirements, including my Tax File Number.
- + If the nominated transfer fund is a SMSF, I confirm that I'm a member, trustee or director of a corporate trustee of the SMSF.
- + If I'm transferring my full account balance, I discharge Mine Super of all further liability in respect of the benefits paid and transferred to my other fund.
- + I understand this transfer request, once actioned, can't be used for future transfers, if any.

Your signature

Date (DD-MM-YYYY)



When complete return this form to us by:

**Post** Mine Super  
Locked Bag 2020 Newcastle NSW 2300