



# Authorisation to transfer superannuation benefits between funds

Use this form if you want to transfer monies from your previous superannuation fund to your existing Zurich superannuation plan.

## Important notes

Please make sure you sign the authorisation over the page. Please complete all details on this form. Transfers cannot be made if the previous fund details are different from the information you complete on this form. If transferring from more than one fund, photocopies of this form will be accepted.

We recommend that you talk to your adviser if the superannuation accounts you wish to transfer:

- have any life cover attached
- were recommended to you by an adviser or
- if you expect that further employer contributions may be made to your previous fund, for example, if you are still working casually in that industry and your employer contributions can only be made to that fund.

**The fund from which you are transferring may require you to attach identification to this form. We recommend that you contact your existing fund to ask about their identification requirements before sending them this form. Zurich's identification requirements are detailed in Section 8 of this form.**

## 1 Personal details

Zurich Superannuation Plan	SPIN ZUR0473AU		
Zurich Retirement Plan	SPIN ZUR0471AU		
Zurich Master Superannuation Fund Unique Superannuation Identifier (USI)	336 328 383 93 987		
Zurich investment number			
Title	Surname	Given name(s)	
<input type="radio"/> Male	<input type="radio"/> Female	Date of birth	/ /
Residential address		State	Postcode
Contact details	Work ( )	Home ( )	
	Mobile	Email	

## 2 Transferring fund details

To ensure this transfer occurs as promptly as possible please complete as much information as possible.

Fund name			
Transferring Superannuation Fund Unique Superannuation Identifier (USI)			
Policy number/Membership number			
Address of fund	State	Postcode	
Telephone number	( )		
Approximate account balance \$	OR	Partial Transfer of \$	
Name of administration company (if known)			
Name of employer contributing to this fund			
Date I left that employer (if applicable)	/	/	

### My personal details when I belonged to the previous fund were:

- (a) If any of your details are the same as the new fund you don't have to write them again.  
 (b) If there has been a name change, please provide certified evidence of the name change.

Title	Surname	Given name(s)	
Address	State	Postcode	

### 3 Transfer amount

Please tick option as applicable. If this section is not completed your total fund value will be transferred.

Total fund value \$  Partial fund value \$

### 4 Applicant's authorisation

- I request and authorise the Trustee of the previous fund to transfer any benefits (including any superannuation contributions received in respect of me after I have ceased to be a member of the previous fund) to the Zurich Master Superannuation Fund
- I understand that the Trustee of my previous fund is discharged from any further liability in respect of any amount once benefits have been transferred
- I understand that both superannuation funds are complying superannuation funds under the Superannuation Industry (Supervision) Act
- I understand that in certain cases Equity Trustees Superannuation Limited may be required by law to deduct tax from the untaxed portion, if any, of the Superannuation Lump Sum transferred from the previous fund
- I approve the deduction of transfer fees (if any) from the benefits transferred (subject to legislative restrictions)
- I understand that transfers between funds are done on at least a quarterly basis
- I understand that any life insurance cover under my previous fund automatically ceases upon transfer of my benefits from that Fund and
- I understand that a contribution fee of up to 5% on the benefits transferred, may be charged.

Applicant's signature

Date

X

/ /

### 5 Trustee declaration

On behalf of the Trustee of the Zurich Master Superannuation Fund, Equity Trustees Superannuation Limited, I confirm that the Zurich Master Superannuation Fund:

- is a Complying Superannuation Fund as defined under Section 42 of the Superannuation Industry (Supervision) Act 1993 (the Act)
- is a Resident Regulated Superannuation Fund as defined under Section 10 of the Act
- is not subject to a direction under Section 63 of the Act, nor does it expect to receive a direction under this Section

Further, I wish to confirm that the Trust Deed governing the Zurich Master Superannuation Fund will accept transfers and rollovers from other Complying Superannuation Funds and that such transfers and rollovers will be preserved in accordance with the Act (if required).

**Vasko Zdraveski, Head of Superannuation Trustee Office – Equity Trustees Superannuation Limited**

### 6 Authorisation to release information

I hereby authorise you to release details to Zurich Australia Limited of the rollover/transfer of my superannuation funds currently held by you to the Zurich Master Superannuation Fund SFN 2540/969/42 for the purposes of updating and follow-up with my financial adviser.

Applicant's signature

Date

X

/ /

### 7 To the paying institution

**Electronic transfer:** Please note the Zurich Master Superannuation Fund's USI is **33 632 838 393 987**.

Please make cheque payable to:  
and post to:

**Zurich Australia Limited  
The Trustee, Zurich Master Superannuation Fund  
C/- Zurich Customer Care  
Locked Bag 994  
North Sydney NSW 2059**

#### Office Use Only

Date received / /

Date actioned / /

Applicant's signature checked Yes  No

Previous Fund authorised Yes  No

## 8 What identification items do we need from you?

To enable Zurich to finalise payment of your redemption / transfer, we require proof of identification to be provided together with your completed Redemption / Transfer form. Please note that the processing of your redemption / transfer will be delayed where you do not provide adequate identification.

If your Redemption / Transfer request is for a rollover to another complying superannuation fund (excluding a Self-Managed Superannuation Fund) you will not have to provide certified proof of identity documents. Instead you can provide your TFN which we will validate using the ATO's Super TIC service. Where we are unable to validate your TFN, you will be required to provide proof of identity documents to Zurich before we can finalise your redemption / transfer.

If you have not previously provided Zurich with your TFN you can provide Zurich with your TFN by:

- Phone: Call our Client Service Centre on 131 551
- Mail/Email: Complete a TFN Notification form (available online at [www.zurich.com.au](http://www.zurich.com.au)) and return it to Zurich at Locked Bag 994, North Sydney NSW 2059 or email it to [client.service@zurich.com.au](mailto:client.service@zurich.com.au)

**In circumstances where we are unable to validate your TFN using the ATO's Super TIC service, or where you wish to rollover to a Self-Managed Superannuation Fund or for a redemption of your member benefit to be paid, you will need to provide us with a certified copy of ONE of the following photographic documents:**

Please tick which one applies

- An **Australian passport** (provide the pages that identify you, including the page with your photograph). A passport that has expired up to 2 years ago is also acceptable;
- An **Australian State or Territory driver's licence bearing your photograph** (front and back copies are required);
- A **proof of age card** issued by an Australian State or Territory (must contain a photograph of you);
- A **Foreign passport containing your photograph and signature** (see below for information on providing foreign language documents).

**OR**

If you cannot provide a certified copy of one of the above documents then you must provide **certified copies** of one document from column A and one document from column B.

A	B
<input type="radio"/> Australian birth certificate <b>OR</b> <input type="radio"/> Australian death certificate (for death claims only)	<input type="radio"/> Letter from Centrelink (or other Commonwealth, State or Territory agency) issued to you within the last 12 months regarding a government assistance payment showing your name and residential address
<input type="radio"/> Australian citizenship certificate	<input type="radio"/> Utilities bill or local government notice issued to you within the last three months showing your name and residential address
<input type="radio"/> Health card issued by Centrelink	<input type="radio"/> Notice issued by the ATO to you within the last 12 months showing your name and residential address
<input type="radio"/> Pension card issued by Centrelink (front and back copies)	<input type="radio"/> Notice from school principal showing name, residential address and period of attendance of person under 18 issued within previous three months

**If you cannot provide any of these documents or you are unsure how to complete your identification form please contact us on 131 551 for assistance.**

**For a complete list of persons who can certify copies of documents, please contact Zurich Customer Care on 131 551, or refer to the Zurich website, [www.zurich.com.au](http://www.zurich.com.au).**

### How to certify a copy of a document

The law requires that we receive certified copies of the identification documents you provide us. A certified copy is a document that has been certified as a true copy of an original document by certain persons.

**An example of a certified document:**

I, John Smith of 123 Park Street, Sydney NSW 2000 in the capacity of a Justice of the Peace certify that this copy is a true and accurate copy of the original.

Signature: J. Smith

Date: 1/7/2019

**Please note:**

- **Any identification documents that are in a foreign language must be accompanied by an English translation from an accredited translator.**
- **If identification documents are being certified outside of the Commonwealth of Australia, generally speaking they may only be certified by an Australian consular officer (within the meaning of the Consular Fees Act 1955) or an Australian diplomatic officer. For further information on obtaining certification whilst overseas, please contact the Zurich Client Service Centre on 131 551 (when calling from Australia) or 61 2 9995 1111 (when calling from overseas).**