

# Living Super transfer out form



## About this form

Complete this form if you would like to move money from Living Super to another super fund.

## Please return to:

Living Super  
Reply Paid 93910  
MELBOURNE VIC 3001

**Important:** Before you transfer funds from Living Super we need to verify your identity. To complete verification, you must send us original certified copies of acceptable identity documents (see section 8). Your identity will then remain verified for up to 12 months from the date the original certified copies were received or the expiry date shown on the documents supplied, whichever comes first. Because passports can be accepted up to 24 months beyond their expiry date, an original certified copy of a passport can allow your identity to remain verified for a maximum of 12 months from the date of receipt.

**Please attach your certified identification documentation to this form.**

## Step 1: Your details

Client number

Living Super account number

First name

Last name

Date of birth (DD/MM/YYYY)

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## Step 2: Rollover details

**Note:** Living Super may transfer your account to the Australian Tax Office (ATO) if your account balance is less than \$6,000.

I would like to roll over:

The whole balance of my fund to

The following sum \$  to

Fund name

ABN

Member number (non-SMSF)

Unique Superannuation Identifier (USI) (non-SMSF)

Phone number

Address

## Step 3: SMSF payment details (only complete for rollovers to a self-managed super fund)

Name of bank, credit union, building society, etc.

Branch address

Branch No. (BSB)

Account number

Account name

Electronic Service Address (EAP)

We will need to receive evidence that confirms the above account is in the name of the self-managed super fund.

Please attach a bank statement, letter from your bank or similar evidence that confirms the BSB, account number and account name.

Evidence attached to confirm the BSB, account number and account name.



## Step 4: Payment options

I am transferring the entire account balance and closing my account

**OR**

This is a partial transfer and I am leaving my account open

If this is a partial transfer, please indicate the amount you would like to withdraw

\$

### Partial transfers only – default sell-down order

If you are initiating a partial transfer and the amount you want to transfer is higher than what you have in your Cash Hub<sup>^</sup>, the following default sell-down order will apply. Please note when the default sell-down order applies, only enough units will be sold down to fund the transfer amount you have selected. For example, if only a portion of units in the Balanced Option needs to be sold down to complete the transfer, any remaining units would remain invested in the Balanced Option.

1. Cash Option
2. Australian Fixed Interest Option
3. International Fixed Interest (Hedged) Option
4. Conservative Option
5. Moderate Option
6. Growth Option
7. High Growth Option
8. Diversified Shares Option
9. Australian Listed Property Option
10. Australian Shares Option
11. International Shares Option
12. Listed securities (in order of highest value to lowest)
13. Term Deposits that haven't matured yet (in order of earliest maturity date to latest)\*

### Partial transfers only – customised sell-down order

If you want us to sell down your investments in a different order to that shown above, please number the investments below in the order you want us to sell them. Please note that if any units in the Balanced Option need to be sold down to fund this transfer, your entire investment in the Balanced Option will need to be sold down and the final amount transferred may be higher than that specified above. This is because partial investments out of the Balanced Option are not permitted when a customised sell-down order is requested.

- |   |   |
|---|---|
| <input type="checkbox"/> Cash Option                                  | <input type="checkbox"/> Diversified Shares Option  |
| <input type="checkbox"/> Australian Fixed Interest Option             | <input type="checkbox"/> Australian Listed Property Option  |
| <input type="checkbox"/> International Fixed Interest (Hedged) Option | <input type="checkbox"/> Australian Shares Option   |
| <input type="checkbox"/> Conservative Option                          | <input type="checkbox"/> International Shares Option  |
| <input type="checkbox"/> Moderate Option                              | <input type="checkbox"/> Listed securities (in order of highest value to lowest)                                |
| <input type="checkbox"/> Growth Option                                | <input type="checkbox"/> Term Deposits that haven't matured yet (in order of earliest maturity date to latest)* |
| <input type="checkbox"/> High Growth Option                           |   |

Before you lodge a transfer request, you should consider the transaction costs of the sale of your investments as well as the interest rate reductions for any Term Deposits you break early.

Any partial transfer request will draw funds proportionally across both your restricted/unrestricted and preserved/non-preserved components.

For more detail about the investment options within Living Super, including the applicable fees, cut-off times and impact of closing Term Deposits early (notice period and interest rate reduction), see the Living Super [Product Disclosure Statement](#) and [Product Guide](#).

\* Term Deposits will remain invested until the earlier of the maturity of the Term Deposit or the Term Deposit break notice period. Interest rate reductions apply when Term Deposits are broken early.

^ Subject to the Cash Hub minimum.



### Step 5: Tax deduction notice

In relation to personal contributions made to your super account, please indicate whether you are:

Eligible and wish to claim a tax deduction

Not claiming a tax deduction

If you're eligible to claim a tax deduction, please complete a Notice of Intention to Claim a Tax Deduction form and send to Living Super together with this form. To download the form, login to your account, go to 'My super finances' and select 'Downloads and links' or call us on 133 464.

**Note:** If you do not submit a Notice of Intention to Claim a Tax Deduction or the Trustee does not accept the notice prior to your transfer, any personal contribution that forms part of the transfer will be treated as non-concessional contributions and you will not be able to claim a tax deduction for the contribution.

### Step 6: Declaration of authorisation

By signing this form I am making the following statements:

- The information above including the bank account being held either solely or jointly in my name is true and correct, understanding that ING does not guarantee that funds sent in error to this account can be recovered.
- I am aware that I may ask the Trustee for information that I reasonably require for the purpose of understanding my benefit entitlements in Living Super, including fees or charges that may apply to any transfer request and the effect of any transfer request on any entitlements (such as insurance cover), and I have either sought this information or do not require such information.
- I authorise Living Super to pay my benefit as instructed on this form and understand and acknowledge the implications and the effects of this transaction.
- I discharge the Trustee from all further liability in respect of the benefits paid.
- I declare that the above information provided is true and correct at the time of signing this form.
- If I have insurance cover, I understand that such cover will stop for any event on or after the date the full account balance is paid.
- The value of my super in Living Super will decrease by the amount transferred from Living Super in accordance with my request.
- The Trustee may not be able to action my transfer where the Trustee has been notified of family law proceedings in relation to my super there may be a delay in payment if my details have changed.
- I have the right to ask Living Super for information that I reasonably require for the purpose of understanding any super entitlements I may have, including information about any fees and charges that may apply to my account and information about the effect of the transfer on any entitlements I have in Living Super. I confirm that I do not require such information.
- I'm aware I may ask Living Super for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits such as insurance cover, and do not require any further information.
- The Trustee may not be able to action my transfer where the Trustee has been notified of family law proceedings in relation to my super there may be a delay in payment if my details have changed.
- I discharge the Trustee from any liability with respect to the amount of my super that is transferred.

Signature

Date (DD/MM/YYYY)

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## Step 7: Verifying your identity

To transfer funds from your account you will need to attach your certified identification documentation.

## Step 8: Proof of identity

### Step 8.1: Choose identification documents

You need to choose either one document from List A or two documents from List B. Please note, the certified copies will not be returned.

**Note: The documents must verify your full name AND either your residential address OR date of birth.**

#### List A

- Australian driver licence (must be current, show current residential address and photograph).
- Australian passport (either a current passport or a passport that expired within the last 2 years).
- Proof of age card / NSW photo card (must be current and show date of birth and photograph).
- International passport or driver licence – front and back of document (current, containing a photograph and a signature and accompanied by a translation from a professional translator accredited by the National).
- Current foreign national identity card issued for the purposes of identification – front and back of document (current, containing a photograph and a signature and accompanied by a translation from a professional translator accredited by the National Accreditation Authority for Translators and Interpreters if not in English).

#### List B

##### One of these documents

- Birth certificate (issued by a State or Territory of Australia).  
**OR**
- Citizenship certificate (issued by the Commonwealth of Australia).  
**OR**
- Pension card or health card (must be current and issued by Centrelink entitling financial benefits).

##### AND

- Social security notice (issued by the Commonwealth or a State or Territory in the past 12 months containing your name and residential address which records financial benefits provided to you).  
**OR**
- Notice issued by the Australian Taxation Office within the past 12 months (containing your name and residential address, and records debts payable by you).  
**OR**
- Rates or utilities notice issued in the last 3 months (containing your name and residential address and recording the provision of services to you and your address).

### Step 8.2: Select a certifier

Take the originals and copies of your identification documents to a document certifier from the list below. Ask them to follow the instructions in Step 8.3.

1. Pharmacist
2. Justice of the Peace
3. Notary public officer
4. Medical practitioner or nurse
5. Police officer
6. Accountant (CA/CPA)
7. Legal practitioner
8. Full-time teacher (school or tertiary)
9. A bank/credit union/building society officer with at least 2 years continuous service
10. A permanent employee of a Commonwealth, State, Territory or local government with at least 2 years continuous service.

### Step 8.3: Complete certification

The person who is authorised to certify documents must sight the original and the copy, make sure the documents are identical and then certify all pages as true copies. To do this they complete the 2 steps below:

1. Certify as true copies by writing or stamping: 'I hereby certify that these pages are a true copy of the original document shown to me on [date],
2. Sign each document and print name and certifier classification. For example; John Smith, Accountant.

**For the curious:** This information was prepared and sent on behalf of Diversa Trustees Limited ABN 49 006 421 638, AFSL 235153, RSE L0000635, the Trustee of Living Super, a sub-plan of OneSuper ABN 43 905 581 638 (Fund) and the issuer of interests in the Fund. Living Super is a product issued out of the Fund. Insurance cover offered by the Fund is provided by MetLife Insurance Limited ABN 75 004 274 882 AFSL 238096. The information contained above is general advice only and has been prepared without taking account of your objectives, financial situation or needs. Consider your personal circumstances, the appropriateness of the product and read the [Product Disclosure Statement](#) and Target Market Determination ([Accumulation](#), [Transition to Retirement](#) and [Pension](#)) are available at the ING Website before making any decision to acquire or continue to hold the product. You may also decide to seek independent financial advice before making a decision about the product. ING is a business name of ING Bank (Australia) Limited ABN 24 000 893 292, AFSL 229823.

