

The following Transfer Request Form has been provided to assist you with the transfer of your superannuation benefits from your current superannuation fund to LifeFocus Superannuation Fund.

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

1 MEMBER DETAILS

Member Number (if known)

Date of Birth* (dd/mm/yyyy)

Please indicate LifeFocus - Superannuation Fund

LifeFocus - Pension Fund

Tax File Number (Refer to Section 6)

Contact Phone Number*

Title (Mr/Mrs/Ms etc)

Surname*

Given Names*

Address*

Suburb/Town*

State*

Postcode*

Termination date with previous employer (dd/mm/yyyy)

Current Employer

2 PAYING INSTITUTION DETAILS (Please provide other superannuation fund details)

Name of Superannuation Fund*

Address

Suburb/Town

State

Postcode

Fund ABN Number

OR

SPIN Number

Membership/Policy Fund with other Fund*

I hereby authorise the transfer of

\$

OR

My entire benefit which is estimated to be

\$

(from the above named fund to LifeFocus Superannuation Fund)

3 PROOF OF IDENTITY

You will need to provide us with Certified ID in order to have your Transfer Request processed.

I have attached a certified copy of my driver's licence or passport

OR

I have attached certified copies of both:

Birth/Citizenship Certificate or Centrelink Pension Card

AND

Centrelink payment letter of Government or local council notice (less than one year old) containing my name and address

4 ACKNOWLEDGEMENT

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 discharge the superannuation provider of my previous fund of all further liability in respect of the benefits paid and transferred to my new fund.

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.

Member Signature*

Date* (dd/mm/yyyy)

5 LIFEFOCUS SUPERANNUATION FUND CERTIFICATE OF COMPLIANCE

The Trustee of LifeFocus Superannuation Fund and Details about the fund – add divisions, sub-plan information etc.

- The Trustee of the LifeFocus Superannuation Fund, certifies that:
- The Trust Deed governing the Plan complies with requirements of the *Superannuation (Industry) Supervision Act 1993* Regulations.
- The Trust Deed allows benefits to be transferred to the Plan.
- Members cannot borrow monies from the Plan.
- Members can only receive benefits from LifeFocus Superannuation Fund on reaching preservation age, age 65 or earlier in the case of invalidity, or as approved individually by the Trustee or the Australian Prudential Regulation Authority, or where the benefit transferred to LifeFocus Superannuation Fund is not subject to compulsory preservation requirements.
- The Trustee of LifeFocus Superannuation Fund is CCSL Limited, ABN: 51 104 967 964, RSE Licence number L0000758. The RSE Registration number for LifeFocus Superannuation Fund is R1055757.
- The ABN for LifeFocus Superannuation Fund is 94 579 217 553.
- Cheques are to be made payable to: **LifeFocus Superannuation Fund**
- Cheques and form/s are to be sent to: **PO Box 1282, ALBURY NSW 2640**

Should you have any further enquiries, please call our Client Service Line on 1300 137 909.

6 DISCLOSURE OF YOUR TAX FILE NUMBER

We are authorised to collect your TFN under the *Superannuation Industry (Supervision) Act 1993*. Your TFN will be used for legal purposes only. This may include finding or identifying your superannuation payments and providing information to the ATO. The purposes for which TFNs are used may change in the future as a result of legislative change.

You are not obligated to provide your TFN, however if you do not provide your TFN you may be subject to higher Tax (No-TFN Tax), than you would otherwise pay on your contributions and benefit payments, although this may be reclaimed through the assessment process.

Please be advised that non-concessional member contributions will be returned to you or your employer if your TFN is not provided to our Fund.

The Trustee will not pass your TFN to any other superannuation provider if you tell the Trustee in writing that you don't want them to pass it on.

ON COMPLETION PLEASE FORWARD TO:

LifeFocus Superannuation Fund
PO Box 1282
ALBURY NSW 2640