



## Step 2 – Provide details of your previous super fund

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**\*\*** All payments to a Self Managed Super Fund (SMSF) must use SuperStream to roll over your super benefits. This means you will need to supply the SMSF Electronic Service Address (ESA).

## Step 3 – Attach proof of identity

☐ I have attached identification (certified where required)

OR

☐ I have not attached identification as it is not required

You may need to provide proof of identity to your previous super fund to allow payment of your super benefit to this Plan. Please check with your previous fund if certified ID is required. If you have more than one rollover, you will need to check the requirements of each of your previous super funds.

If ID is required, please attach a copy of either your driver's licence or passport (or acceptable alternatives), certified where required. If you have more than one rollover and certified ID is required by each fund, please attach an original certified copy for each rollover. See the **"Completing proof of identity"** section for details of certification and acceptable alternative documents.

☐ I have attached identification (certified where required)

OR

☐ I have not attached identification as it is not required

If you do not provide proof of identity where it is required, there may be delays in processing your payment(s).

## Step 4 – Privacy

Our Privacy Policy is available on Qantas Super's website, [www.qantassuper.com.au](http://www.qantassuper.com.au) or you can obtain a copy by contacting us on **1300 362 967**.



## Step 5 – Sign the form

I request that you transfer the total value held in respect of me for the above super fund or policy to Qantas Super:

- I understand that on payment by my previous super fund, I discharge that super fund from any further liability in respect of the amount transferred.
- I approve the deduction of any appropriate exit fees from the amount transferred subject to legislative restrictions.
- I request that any further contributions received by my previous super fund after my payment, be redirected to my membership with Qantas Super.
- I understand that information contained in this form will be handled by the Trustee of Qantas Super to process my rollover and that any personal information may be disclosed to the administrator, government agencies or any other party as necessary. By signing this form I consent to the handling of my personal information in this way.
- I understand that I will receive confirmation once my money has been received in Qantas Super.
- I understand that I have the right to ask my previous super fund for information that I reasonably require for the purpose of understanding any super entitlements I may have in that fund, including information about any fees and charges that may apply to the transfer and information about the effect of the transfer on any entitlements I have in my previous super fund. I confirm that I do not require such information from my previous fund.

Signature

X

Date

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### Notes

Please ensure that all details on the front of this form are completed.

Your old fund may charge an exit fee and/or set a buy/sell margin which would mean a reduction in the amount transferred. Please check with the administrator of your old fund for details of any fees. No entry fee will be charged by Qantas Super on receipt of this benefit.

Also, some super funds have a waiting period. They are commonly 30, 60 or 90 days, and in certain circumstances, up to 6 or 9 months.

If there is a delay in processing your transfer, it may be that a waiting period applies at your old fund.

Do not complete this form if you:

- Wish to transfer only part of the benefit held in your old fund to Qantas Super; or
- Are still working for your old employer on a casual basis and expect that employer to pay further contributions on your behalf into your old fund; or
- Have advised the Australian Taxation Office to pay an amount from the Superannuation Holding Accounts Reserve (SHAR) to your old fund; or
- Have taken an option under your old fund to continue your insurance cover for a specific period, which has not yet expired; or
- Are not comfortable with, or sure of the exit charges that apply from your old fund.

Once your transfer-in has been deposited to your account, we will send you confirmation that your money has been deposited. Your old fund should also send you confirmation that they have closed your account and transferred your money to Qantas Super.

While Qantas Super endeavours to complete your transfer quickly, delays may be experienced due to administration processing times of your old fund.

**Please return your completed form to Qantas Super, GPO Box 4303, Melbourne, VIC 3001.**



## Completing proof of identity

### Primary photographic identification

You will need to provide a copy of **one** of the following primary identification documents:

- Current Australian or foreign driver's licence (including the back of the driver's licence if your address has changed)
- Australian passport
- Current foreign passport<sup>1</sup>, or similar document issued for the purpose of international travel<sup>1</sup>
- Current card issued under a State or Territory for the purpose of proving a person's age
- Current national identity card issued by a foreign government for the purpose of identification<sup>1</sup>

Identification documents must not be expired (excepting an Australian passport which may be expired within 2 years).

### Alternative identification

If you are unable to provide any primary photographic identification, you will need to provide two identification documents, one from each of the following lists:

- Birth certificate or birth extract<sup>1</sup>
- Citizenship certificate issued by the Commonwealth
- Pension card issued by the Department of Human Services (Centrelink) that entitles the person to financial benefits

**AND**

- Letter from the Department of Human Services (Centrelink) or other Government body in the last 12 months regarding a Government assistance payment
- Tax Office Notice of Assessment issued in the last 12 months
- Rates notice from local council issued in the last 3 months
- Electricity, gas or water bill issued in the last 3 months
- Landline phone bill issued in the last 3 months (mobile phone bills will not be accepted)

### Name change

If you have changed your name, you must provide a certified copy of the relevant name change document<sup>1</sup>, for example, a Marriage Certificate issued by the Registry of Births Deaths & Marriages, Decree Nisi or Deed Poll (in addition to the above identification).

**If your legal name or date of birth does not match exactly to our records** (excluding aforementioned name changes), please contact us for further instructions.

### Signing on behalf of another person

If you are signing on behalf of the applicant you will need to provide the following:

- A **certified** copy of the Guardianship papers or Power of Attorney; and
- A **certified** copy of the appropriate proof of identity for the holder of the Guardianship or Power of Attorney.

Note: Certified ID is also required for the member

#### <sup>1</sup> Translation

If your identification is written in a language other than English, the identification must be accompanied by an English translation prepared by a translator accredited by the National Accreditation Authority for Translators and Interpreters Ltd. (NAATI) at the level of Professional Translator or higher (or an equivalent accreditation), to translate from a language other than English into English.

### How to certify documents

After sighting the original and the copy and making sure both documents are identical, the certifier must include on EACH page:

- Written or stamped 'certified true copy'
- Signature and printed full name
- Qualification (such as Justice of the Peace, Australia Post employee, etc)
- Date (the date of certification must be within the 12 months prior to our receipt)



← A clear copy of the document that identifies you (i.e. your driver's licence (front and back) or passport)

Certified true copy ← Write or stamp 'certified true copy' of the original document

*J. Sample* ← The authorised person's signature

Mr John Sample ← Full name, qualification and registration number (if applicable) of the authorised person

Justice of Peace ← Date of certification (within 12 months of receipt)

Registration No. 123456789

Date: 01/02/2012 ←

### Verification

A verification of the certifying party may be performed. If a discrepancy arises, you may be requested to re-certify documentation.

### Important Note

The information in this document is a guide only and we may request additional documentation prior to any payment.



## Completing proof of identity

### Who can certify documents in Australia?

- Permanent employee of the **Australian Postal Corporation** with two or more years of continuous service who is employed in an office supplying postal services to the public
- Agent of the **Australian Postal Commission** who is in charge of an office supplying postal services to the public.
- **Architect**
- **Australian Consular Officer or Australian Diplomatic Officer** (within the meaning of the Consular Fees Act 1955)
- **Bailiff**
- **Bank officer, building society officer or credit union officer** (with two or more continuous years of service)
- **Commissioner for Affidavits or Declarations**
- **Court Officer**, Registrar or Deputy Registrar of a Court, Judge, Clerk, Magistrate, Master of a Court, Chief Executive Officer of a Commonwealth Court
- **Fellow of the National Tax Accountant's Association**
- **Finance Company Officer** (with two or more continuous years of service with one or more finance companies)
- **Financial Adviser or Financial Planner**
- **Holder of a Statutory office not specified in another item**
- **Justice of the Peace**
- **Legal practitioner**
- **Marriage celebrant** (registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961)
- **Medical practitioner, Chiropractor, Dentist, Nurse, Optometrist, Physiotherapist, Psychologist, Midwife, Occupational Therapist**
- **Member of Chartered Secretaries Australia**
- **Member of Engineers Australia** (other than at the grade of student), a Registered Professional Engineer of Professionals Australia or registered under a law of the Commonwealth, a State or Territory or registered on the National Engineering Register by Engineers Australia
- **Member of the Association of Taxation and Management Accountants**
- **Member of the Australasian Institute of Mining and Metallurgy**
- **Member of the Australian Defence Force** (who is an officer; or a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with two or more years of continuous service or a warrant officer within the meaning of that Act)
- **Member of the Governance Institute of Australia Ltd**
- **Member of the Institute of Chartered Accountants in Australia and New Zealand**, the Australian Society of Certified Practising Accountants, Member of the Institute of Public Accountants or the Association of Taxation and Management Accountants
- **Member of Commonwealth Parliament, State Parliament, Territory Legislature or a Local Government Authority** (State or Territory)
- **Migration agent registered under Division 3 of Part 3 of the Migration Act 1958**
- **Minister of Religion** (under Subdivision A of Division 1 of Part IV of the Marriage Act 1961)
- **Notary Public**
- **Officer with, or Authorised Representative of an Australian Financial Services Licensee** (who has had at least two years of continuous service with one or more licensees)
- **Officer with, or a credit representative of, a holder of an Australian credit licence** (who has had at least two years of continuous service with one or more licensees).
- **Permanent employee of the Commonwealth** (or Commonwealth Authority) **or a State or Territory** (or State or Territory Authority) **or a Local Government Authority with two or more years of continuous service**
- **Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made**
- **Pharmacist**
- **Police Officer, Sheriff or Sheriff's Officer**
- **Senior Executive Service Employee of the Commonwealth** (or Commonwealth Authority) **or a State or Territory** (or State or Territory Authority)
- **SES Employee of the Commonwealth**
- **Teacher employed on a full-time basis at a school or tertiary education institution**
- **Trade marks attorney, Patent Attorney**
- **Veterinary surgeon**

### Who can certify documents outside of Australia

- an authorised staff member of an Australian Embassy, High Commission or Consulate
- an authorised employee of the Australian Trade Commission who is in a country or place outside Australia
- an authorised employee of the Commonwealth of Australia who is in a country or place outside Australia
- a Member of the Australian Defence Force who is an officer or a non-commissioned officer with two or more years of continuous service
- a Notary Public from a country ranked 129 or below in the latest Transparency International Corruptions Perception Index: <http://www.transparency.org>

