

ROLLOVER REQUEST FORM – IN SPECIE TRANSFER

WARNING !

Transferring assets In Specie may not be permitted by all institutions. Transferring assets in this form does not eliminate the need to pay any tax on what is effectively a "sale" from one entity to another. If you are unsure about how you will pay any required tax prior to transfer or the impact this may have on your benefit you should consult your financial adviser.

Date

Current Account / Fund / Policy Details

Rollover Institution / Fund Administrator / Trustee	Institution phone number
Current Fund Name (if applicable)	
Address Postcode	Policy / Account number

Member Details

Title	Full Name
Address Postcode	Date of Birth

Transfer Details

Please transfer all my investments with your organisation IN SPECIE to:

Insert name of trustee(s)

as trustee for

Insert name of fund	ABN
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Authorisation

I hereby authorise you to:

- ✓ forward the transfer documentation; and
- ✓ provide any other relevant or requested information regarding my account

To the administrator of the fund as follows:

smartsuper pty limited
PO Box 529
North Sydney NSW 2059

Please phone **1300 138 348** if you have any queries

I hereby authorise smartsuper pty ltd to access and/or obtain copies of all information and documentation relating to my superannuation fund account and investments.

Signature	Date
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COMPLIANCE STATEMENT

We wish to confirm the following in respect of the Fund:

1. The Fund is a Regulated Superannuation Fund for the purposes of SIS.
2. The governing deed of the Fund allows benefits to be transferred to the Fund, with no minimum amount applicable.
3. The Fund is administered to satisfy "member protection standards" prescribed under SIS and the Regulations thereto.
4. Benefits under the Fund are subject to the preservation requirements prescribed under SIS and the Regulations thereto.
5. We are willing to accept the transfer of superannuation monies on a trustee to trustee basis.
6. Members are not permitted to borrow monies from the Fund.

Please note that this document complies with Reg. 6.29 – regulated superannuation funds, of the Superannuation Industry (Supervision) Act 1993