

# ROLLOVER REQUEST FORM – CASH IN & ROLLOVER

## WARNING !

Completion of this form will result in any investments you have with the other super fund / institution being sold and converted to cash prior to being transferred which may result in tax being deducted before the transfer. If you are unsure about 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 the balance of my account with your organisation by cheque made payable 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 cheque for the balance of my account; 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