

A guide to rolling your entire account balance into HOSTPLUS Executive




By completing the Rollover form, you're requesting the transfer of the **WHOLE** balance of your superannuation benefits to **HOSTPLUS Executive**. The form **CANNOT** be used to transfer part of the balance of your superannuation benefits. The form will **NOT** change the fund to which your employer pays your contributions. The standard choice form must be used by you to change funds.

How to roll over

Before completing the Rollover form

Please ensure you read the important information below.

When completing the Rollover form


- Refer to these instructions where a question shows a message like this: 
- Print clearly in **BLOCK LETTERS**.

What happens to my future employer contributions?

Using the Rollover form to transfer your benefits will not change the fund to which your employer pays your contributions and may close the account you are transferring your benefits **FROM**.

If you wish to change the fund into which your contributions are being paid, you will need to speak to your employer about Super Choice. For the appropriate forms and information about whether you are eligible to choose the fund to which your employer contributions are made, visit www.superchoice.gov.au or call the Australian Taxation Office on 13 10 20.

More information

-  This transfer may close your account (you will need to check this with your **FROM** fund).

The Rollover form **CANNOT** be used to:

- transfer part of the balance of your superannuation benefits – if you'd like to roll part of your account into **HOSTPLUS Executive**, use the Rolling part of your account balance into **HOSTPLUS Executive** form
- transfer benefits if you don't know where your superannuation is
- transfer benefits from multiple funds on the one form – a separate form must be completed for each fund you wish to transfer superannuation from
- change the fund to which your employer pays contributions on your behalf
- open a superannuation account, or
- transfer benefits under certain conditions or circumstances, for example if there is a superannuation agreement under the Family Law Act 1975 in place.

Things you need to consider when transferring your superannuation

When you transfer your superannuation, your entitlements under that fund may cease. You need to consider all relevant information before you make a decision to transfer your superannuation. If you ask for information, your superannuation provider must give it to you. Some of the points you may consider are:

- **Fees** – your **FROM** fund must give you information about any exit or withdrawal fees. If you are not aware of the fees that may apply, you should contact your fund for further information before completing the form. The fees could include administration fees as well as exit or withdrawal fees. The differences in fees that different funds charge can have a significant effect on what you will have to retire on. For example, a 1% increase in fees may significantly reduce your final benefit.

- **Death and disability benefits** – your **FROM** fund may insure you against death, illness or an accident which leaves you unable to return to work. If you choose to leave your current fund, you may lose any insurance entitlements you have. **HOSTPLUS Executive** may not offer the same insurance so it's important that you check the costs and amount of cover offered.

How long will it take?

Generally funds process rollover and transfer requests within 30 days of you providing all necessary information. We are reliant on receiving information from the fund you are exiting from to finalise your request within the time limit. If the required information is not received within 30 days from your exiting fund, we will notify you.

What happens if I do not quote my Tax File Number (TFN)?

If you do not provide your TFN, contributions made to your account may be taxed at the highest marginal tax rate plus the Medicare levy, compared to the concessional tax rate of 15%. **HOSTPLUS Executive** may deduct this additional tax from your account.

If we do not have your TFN, you will not be able to make personal contributions to your **HOSTPLUS Executive** account. Choosing to quote your TFN will also make it easier to keep track of your superannuation in the future.

Under the Superannuation Industry (Supervision) Act 1993, **HOSTPLUS Executive** is authorised to collect your TFN, which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change. The TFN may be disclosed to another superannuation provider, when your benefits are being transferred, unless you request in writing that your TFN is not to be disclosed to any other trustee.

Your privacy

The information requested on the Rollover form is required in order for us to carry out your instructions to roll over your superannuation to us. We will provide this information to our administrator and to your old fund. If you do not provide us with this information we may not be able to carry out your rollover instructions.

Your personal information will not be used or disclosed for any other purpose without your consent, except where required by law. You are able to gain access to this information by calling **1300 799 998**, 8am–8pm, Monday to Friday. Alternatively, you can email info@mail.hostplusexecutive.com.au with your request.

Checklist

- Have you read all the information?
- Have you considered where your future employer contributions will be paid?
- Have you completed all of the mandatory fields on the Rollover form?
- Have you signed and dated the form?
- Have you attached the certified documentation including any linking documents if applicable?

The simple way to certify proof of identity



When you're getting all your super together, you could be transferring thousands of dollars between funds. To help your super funds know they're transferring your money to the right place, you have to provide the right documents to prove your identity. If you don't provide HOSTPLUS Executive with the right documents, it'll take us longer to get your super together for you. So here's a quick and easy guide to getting your proof of identity certified right.

Step 1

Make a copy of your current/valid driver's licence or passport

Ensure the copy is clear and legible. If you're using your current/valid driver's licence, remember to make copies of both sides. And if you're using your current/valid passport, remember to make copies of the photo identity page of your passport.

Other acceptable ways to prove your identity

If you don't have a driver's licence or passport, use one document from Group A and one document from Group B. Please ensure the names that appear on each document are the same as what appears on your HOSTPLUS Executive account.

Group A	Group B
Birth certificate	Letter from Centrelink
Citizenship certificate	Tax office notice of assessment
Centrelink pension card	Rates notice from local council

Step 2

Certify every page of your proof of identity

Bring your original documents and copies to an authorised person. The most convenient places to find an authorised person are your post office, police station or pharmacy.

They will need to compare your copy with the original, then stamp or write **'This is a true and correct copy of the original'**, followed by their signature, name, address, occupation, phone number, registration number (if applicable) and the date on every page of your proof of identity.

Can't get to a post office, police station or pharmacy?

Other authorised people who can certify proof of identity

Chiropractor	Psychologist	Magistrate	Judge
Dentist	Veterinary surgeon	Ministry of religion	Notary public
Nurse	Registered medical practitioner	Justice of Peace	Registrar or Deputy Registrar of a court
Bank officer with two or more years continuous service	Finance company officer with two or more years continuous service	Member of the Institute of Chartered Accountants in Australia (ICA) or the Australian Society of Certified Practising Accountants (ASCPA)	Chief executive officer of a Commonwealth court

Step 3

Mail your completed form and certified copies of your identity to HOSTPLUS

We need to sight the original signatures on both your rollover form and your certified proof of identity documents. So you can't fax, scan or email them to us.

Naturally, if you have any questions, simply call **1300 799 998**, 8am-8pm, Monday to Friday and we'll be happy to help.

Have you changed your name or are signing on behalf of someone?

You'll have to provide one of the following linking documents to prove a relationship exists between the two (or more) names.

Change of name	Signing on behalf of someone
Marriage certificate	Guardianship papers
Deed poll	Power of attorney
Change of name certificate	