

# Rolling part of your account balance into HOSTPLUS Executive



By completing this form, you're requesting the transfer of the PARTIAL balance of your superannuation benefits to HOSTPLUS Executive. This form CANNOT be used to transfer the entire balance of your superannuation benefits. This 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 this form

Please ensure you read the important information below.

### When completing this form

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

### After completing this form

- Sign the authorisation
- Attach the appropriately certified proof of identity documents
- Review the checklist below
- Send the request form to HOSTPLUS Executive.

## More information

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

### This form CANNOT be used to:

- transfer the entire balance of your superannuation benefits – if you'd like to roll your entire account into HOSTPLUS Executive, use the *Rolling your entire account balance into HOSTPLUS Executive form*
- transfer benefits if you don't know where your superannuation is
- transfer benefits from multiple funds on this 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.

### 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 this form?
- Have you signed and dated this form?
- Have you attached the certified documentation including any linking documents if applicable?

### What happens to my future employer contributions?

Using this 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](http://www.superchoice.gov.au) or call the Australian Taxation Office on 13 10 20.

### 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 this 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.

### What happens if I do not quote my Tax File Number (TFN)?

You don't have to provide us with your TFN. However, 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.

## Completing proof of identity

You will need to provide documentation with this transfer request to prove you are the person to whom these superannuation entitlements belong.

### Acceptable documents

You can provide proof of identity in one of the following ways:

#### 1 By providing one of the following documents only:

- driver's licence issued under State or Territory law
- passport

OR

#### 2 By providing one document from both Group A and Group B

### Group A

- birth certificate or birth extract
- citizenship certificate issued by the Commonwealth
- pension card issued by Centrelink that entitles you to financial benefits

### Group B

- letter from Centrelink regarding a Government assistance payment
- notice issued by Commonwealth, State or Territory Government or local council within the past twelve months that contains your name and residential address.  
For example:
  - Tax Office Notice of Assessment
  - Rates notice from local council

### Have you changed your name or are you signing on behalf of another person?

If you have changed your name or are signing on behalf of the applicant, you will need to provide a certified linking document. A linking document is a document that proves a relationship exists between two (or more) names.

The following table contains information about suitable linking documents.

Purpose	Suitable linking documents
Change of name	Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office.
Signed on behalf of the applicant	Guardianship papers or Power of Attorney.

### How to certify documents

#### Step 1

Make a copy of the original document/s. All copies must be clear and legible before certifying.

#### Step 2

Take the original identification document and a photocopy of both sides of the original document to an authorised person. We are unable to accept certification on the reverse side of the photocopied document.

### The authorised person must:

- Write in English on the photocopies: 'This is a true and correct copy of the original.'
- Write their name, address, occupation, business hours telephone number and registration number (if applicable) and sign each photocopy.

### Who can certify documents

- chiropractor
- dentist
- nurse
- registered medical practitioner
- pharmacist
- psychologist
- veterinary surgeon
- legal practitioner, who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia
- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
- bank officer with 2 or more continuous years of service
- chief executive officer of a Commonwealth court
- finance company officer with 2 or more years of continuous service
- judge of a court
- Justice of the Peace
- magistrate
- member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants
- minister of religion
- notary public
- officer with, or authorised representative of, a holder of an Australian financial services licence, having 2 or more years of continuous service with one or more licensees
- permanent employee of the Australian Postal Corporation with 2 or more years of continuous service who is employed in an office supplying postal services to the public
- police officer
- Registrar, or Deputy Registrar, of a court
- teacher employed on a full-time basis at a school or tertiary education institution.

### Where do I send the form?

You can send your completed and signed form with your certified proof of identity documents to:

HOSTPLUS Executive  
Reply Paid 83142  
Carlton South VIC 3053

### Your privacy

The information requested on this 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](mailto:info@mail.hostplusexecutive.com.au) with your request.

### How long will it take?

HOSTPLUS Executive will process rollover and transfer requests within 30 days after you have provided us with all the necessary information. If additional information is required by HOSTPLUS Executive we will notify you within 10 working days of receipt of the rollover request. HOSTPLUS Executive relies on the co-operation of the FROM fund to finalise your request within the time limit detailed above.



