

SMART

Request to Transfer Superannuation Benefits into SMART



SUGAR
MANUFACTURERS
OF AUSTRALIA
RETIREMENT
TRUST

Mail: SMART Administration GPO Box 1424 Brisbane Qld 4001 Freecall: 1800 802 800

IMPORTANT: Please use BLOCK letters and black ink when completing this form and ensure it is signed and dated.

If you wish to transfer money from more than one superannuation fund to SMART, please complete a separate form for each fund (you can use photocopies or contact SMART for extra forms).

Current SMART Member details

SMART Membership Number	SFN	Date of Birth (DD/MM/YYYY)
<input type="text"/>	1 4 9 8 6 9 9 4 1	<input type="text"/>
Mr/Mrs/Ms/Miss	Surname	<input type="text"/>
Given Names		
<input type="text"/>		
Street Number / PO Box	Street Name	
<input type="text"/>	<input type="text"/>	
Suburb / Town	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Business/Contact number	Home Phone number	
<input type="text"/>	<input type="text"/>	
Email address		
<input type="text"/>		

Details of previous fund (You may also attach a copy of your previous fund statement).

Previous Fund member number	Name of previous fund	
<input type="text"/>	<input type="text"/>	
Address of previous fund	Street Name	
Street Number / PO Box	<input type="text"/>	
Suburb / Town	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Name of previous employer		
<input type="text"/>		
Approximate date you left this employer (DD/MM/YYYY)	Previous fund contact number	
<input type="text"/>	<input type="text"/>	
Approximate value of benefit being transferred		
\$ <input type="text"/>		
Your member details in the previous fund		
Complete this section only if your details are different from those held with SMART Note: Evidence of a name change must be attached (eg. copy of marriage certificate, deed poll or decree nisi).		
Mr/Mrs/Ms/Miss	Surname	
<input type="text"/>	<input type="text"/>	
Given Names		
<input type="text"/>		
Street Number / PO Box	Street Name	
<input type="text"/>	<input type="text"/>	
Suburb / Town	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

86.0 0607 02 1

Trustee: S.M.A.R.T. PTY LTD ABN 71 010 747 574 AFSL 295142 RSE L000 1175 RSE R 100 4229
Freecall: 1800 802 800 Fax: (07) 3013 8898 Email: smart@as.com.au Web: www.smartsuper.net

Tax File Number (TFN) details

- SMART is authorised to collect your TFN under the Superannuation Industry (Supervision) Act 1993 and is governed by the Privacy Act.
- If you do provide your TFN, it will only be used for purposes approved by the law. This includes finding or identifying your superannuation benefits where other information is insufficient, calculating tax on any benefit to which you may be entitled, for superannuation surcharge purposes or providing information to the Commissioner of Taxation. These purposes may change in the future.
- You are under no obligation to provide your TFN and declining to quote your TFN is not an offence.
- If you do not provide your TFN, you may pay more tax on your benefits than you have to or you may have to pay the superannuation surcharge. It may also be more difficult to administer your benefit if SMART does not have your current address, if you wish to amalgamate your superannuation accounts or if you have insufficient identification to claim or enquire about your benefits. These consequences may change in the future.
- If you provide your TFN, it will be passed on to the Trustee of any other superannuation fund to which your benefits are transferred or rolled over in the future unless you indicate otherwise on this form. Your TFN may also be given to the Australian Taxation Office if required; for example, if you have unclaimed monies.

If you do not provide us with your TFN:

- From 1 July 2007, Government legislation requires that contributions paid by your employer and any salary sacrifice contributions you make are taxed at the highest marginal rate; and
- From 1 July 2007, SMART can no longer accept any voluntary contributions you may make.

My tax file number is:

Proof of identity

The fund you are transferring your superannuation funds from may request you to provide documentation to prove you are the person to whom the superannuation entitlements belong.

Acceptable Documents

The following documents may be used

EITHER

One of the following documents only:

- drivers licence issued under State or Territory law
- passport

OR

One of the following documents:

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

AND

One of the following documents:

- letter from Centrelink regarding a Government assistance payment
- notice issued by Commonwealth, State or Territory within the past twelve months that contains your name and residential address.

For example:

- Tax Office Notice of Assessment
- Rates notice from local council.

Certification of personal documents

All copied pages of ORIGINAL proof of identification documents (including any linking documents) need to be certified as true copies by any individual approved to do so (see below).

The person who is authorised to certify documents must sign the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (eg Justice of the Peace, Australia Post employee, etc) and date.

The following can certify copies of the originals as **true and correct** copies:

- a permanent employee of Australia Post with five or more years of continuous service
- a finance company officer with five or more years of continuous service (with one or more finance companies)
- an officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having five or more years continuous service with one or more licensees
- a notary public officer
- a police officer
- a registrar or deputy registrar of a court
- a Justice of the Peace
- a person enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia, as a legal practitioner
- an Australian consular officer or an Australian diplomatic officer
- a judge of a court
- a magistrate, or
- a Chief Executive Officer of a Commonwealth court.

Privacy

Please note that by sending SMART personal information about yourself, you are agreeing to the following:

1. That you have read the SMART Privacy Statement and understand how SMART intends to protect your personal details, particularly in relation to the collection, storage, quality, use and disclosure (sharing) of personal information.
2. That SMART can use it for the purposes of running your superannuation account.

If you have any questions about your rights under the privacy legislation, please call SMART on 1800 802 800.

Declaration

- I authorise SMART to arrange with the Fund nominated above to transfer my benefit to SMART and acknowledge that this notice is irrevocable.
- I discharge the Trustee of my previous superannuation fund from any further liability in respect of any amount once the benefit has been transferred to SMART.
- I approve the deduction of transfer fees by my previous superannuation fund (if any) from the benefit transferred (subject to legislative restrictions).
- I understand that in certain cases SMART may be required by law to deduct tax from the untaxed portion (if any) of the Superannuation Lump Sum Payment.
- I request that any contributions received after payment of my benefit be transferred to my account with SMART.

Member's Signature



Date (DD/MM/YYYY)

86.0 0607 02 2

Trustee: S.M.A.R.T. PTY LTD ABN 71 010 747 574 AFSL 295142 RSE L000 1175 RSE R 100 4229
Freecall: 1800 802 800 Fax: (07) 3013 8898 Email: smart@aas.com.au Web: www.smartsuper.net