

Rollover Form.



What's this form for?

To ask another super fund to transfer your money with them to Virgin Super. Please note, you will need to provide acceptable proof of identity such as current passport or Australian driver's licence.

A few tips for you.

- Use blue or black pen
- Print within the boxes in clear BLOCK LETTERS and use not
- Faxed copies are not valid
- If you have multiple super funds, you'll need to complete a separate form for each fund. For additional forms, contact Virgin Super, photocopy this form or download it from virginmoney.com.au

STEP 1 VITAL STATISTICS

Name	First	Last	
Address			
Date of Birth	Gender	Email	
Virgin Super Member Number			

STEP 2 YOUR OLD FUND DETAILS

Name of old fund	Membership Number		
Name of old super account (if known)	Value of fund (approx) \$		
Address of old fund (if known)	Amount to Rollover OR \$		
Suburb	State	Postcode	Rollover entire fund (tick) <input type="checkbox"/>

Instruction to the other fund trustee

I authorise the transfer of all my benefits as noted above, to Virgin Super with all the relevant details, including details of my membership, and any other information that may be required to effect this transfer.

I am aware that as a member of the fund, I may ask you for information about my benefit entitlements in the fund, but I do not require such information.

STEP 3 PROOF OF IDENTITY

To ensure there are no delays in processing your rollover request, please ensure you enclose a certified copy of either of the following proof of identity documents:

- Driver's licence issued under State or Territory law
- Passport

If you don't hold one of these documents, call us on 1300 652 770 before sending in your Rollover Form to find out what additional proof of identification we accept.

1. I authorise the transfer of all my benefits as outlined above.
2. In doing so, I understand that:
 - the funds rolled into my account will be invested in line with my existing Virgin Super investment strategy;
 - I understand that by rolling to Virgin Super I may incur fees or lose benefits (for example, insurance) that I currently hold with my old fund;
 - the trustee of my old fund is discharged from liability once the money has been rolled over;
 - I approve the deduction of transfer fees (if any) from the amount transferred (subject to law);
 - in certain cases, the Trustee may be required (under law) to deduct tax from the untaxed portion (if any) of the amount transferred and;
 - any info Virgin Super provides me is of general nature only. If I'm unsure about anything, I'll chat with a financial advisor.

Signature		Date	/ /
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Please sign the form and post it to Virgin Super. We'll let you know when we receive the money from your old fund (this should take about a month).

Customer Care Team
Virgin Super, Reply Paid 1489
Wollongong DC, NSW 2500

1300 652 770
8am – 6pm (EST)
Monday – Friday
if you need any help.