

Partial rollover to eligible Super fund

Complete this form in pen using CAPITAL letters. Where applicable complete boxes with an

SECTION 1 - YOUR PERSONAL DETAILS

Client number

Last name

Mr

Mrs

Miss

Ms

Dr

First name/s

Female

Male

Date of Birth

Street address

Suburb/town

State

Postcode

Postal address (if different to street address)

Suburb/town

State

Postcode

Home phone

Day time phone

Mobile

Email

Would you like to receive all communications and documents electronically (where legally possible)?

 Yes

 No

SECTION 2 - TAX DETAILS

Supplying your Tax File Number (TFN) to the Fund is optional. Before you decide whether to provide your TFN, we are required to notify you of the following information:

- Supplying your Tax File Number (TFN) to the Fund is optional. Before you decide whether to provide your TFN, we are required to notify you of the following information:
- The Trustee is authorised under the Superannuation Industry (Supervision) Act 1993 to collect your TFN.
- Your TFN is confidential and it is not compulsory to provide it. However, if you choose not to provide it now or later, you may have to pay significantly more tax on your contributions than you should, we may not be able to accept certain types of contributions and each withdrawal you make will be subject to tax at the highest marginal tax rate. It may also prove more difficult to locate or transfer in any benefits due to you, without your TFN.
- If you do choose to provide your TFN, it will only be used for lawful purposes. These include finding or identifying your super where other information is insufficient, calculating any tax payable on contributions or payments provided and providing information to the ATO. These purposes may change in the future due to legislative requirements.
- If you provide your TFN, the Trustee may then also provide your TFN to the Trustee of any other super fund provider, to which your benefits may be transferred in the future, unless you advise us in writing not to do so. Your TFN will not be provided to any other party or individual.

Tax File Number (TFN)

Please note: If TFN is not provided then you are required to provide certified ID - see section 7.

SECTION 3 - WITHDRAWAL DETAILS

a) How much would you like to rollover to your eligible Superannuation fund?

b) Would you like this amount withdrawn after (net) tax?

 Yes

 No, before tax.

SECTION 4 - PRESERVATION DETAILS

a) Do you want to choose the preservation categories from which your funds are drawn?

 Yes (complete the section below)

 No (go to section 5)

Unrestricted non-preserved

or ALL Unrestricted non-preserved

Restricted non-preserved

or ALL Restricted non-preserved

Preserved

or ALL Preserved



SECTION 5 - DRAW DOWN OPTIONS

You have a choice of which investment options your funds will be drawn down from. If you do not make a choice or your selection is invalid (eg. doesn't add to 100%) your rollover will be pro-rata from your nominated investment options.

If you require this allocation to be different from this standard procedure, please indicate the proportions below. If not, go to section 6

| Investment Option | Percentage | | | |
|--------------------------------------|------------|----------|----------|----------|
| My WA Super | | | | % |
| Diversified High Growth | | | | % |
| Diversified Moderate | | | | % |
| Diversified Conservative | | | | % |
| Australian Listed & Private Equities | | | | % |
| Global Listed & Private Equities | | | | % |
| Sustainable Future | | | | % |
| Property & Infrastructure | | | | % |
| Bonds & Yield | | | | % |
| Cash | | | | % |
| Australian Listed Equities (Index) | | | | % |
| Global Listed Equities (Index) | | | | % |
| Total | 1 | 0 | 0 | % |

SECTION 6 - RECEIVING FUND DETAILS

a) Which eligible Superannuation fund do you want your partial benefit rolled over to?

Fund name

Unique Superannuation Identifier (USI)

Australian Business Number (ABN)

Phone

Client or account number

SECTION 7 - CERTIFIED ID

It is a requirement that we receive your TFN in order to validate your member identification with the ATO when processing your rollover request.

If you have not provided your tax file number then you will need to provide certified ID. See the Proof of ID factset at www.wasuper.com.au/super/member-forms-and-publications.

If you have provided your TFN but the ATO cannot validate your identity, the fund will require you to submit certified ID in order to proceed with your rollover request. The fund will advise you in writing should certified ID be required.

SECTION 8 - ACKNOWLEDGEMENT AND DECLARATION

- I acknowledge that I have read and understood the above information relating to the provision of my TFN.
- I have read and understood the Fund's Privacy Statement outlined in the Product Disclosure Statement.
- If required, I have attached my certified personal identification requirements that need to be met when submitting this form.
- If my residential address is different to that which is registered with WA Super I have attached proof of residential address to this form. (eg. a utilities bill, ATO notice of assessment).

Signature

Date