Seamless Transfer of your Member Direct account



If you are currently invested in Member Direct, use this form to open a Choice Income account without having to sell and re-purchase your holdings in Member Direct, preventing the trigger of capital gains and losses.

Who should use this form?

This form is to be used by members with an existing Member Direct account who wish to open a Choice Income account without having to sell their existing investments in Member Direct.

How Seamless Transfer works

We transfer your existing Member Direct account balance from your super account to a new Choice Income account. Transferring means you can stay invested and removes any costs associated with transaction costs and market risk. For Seamless Transfer, the whole Member Direct balance must be transferred across – partial transfers of your Member Direct account are not possible.

Important information about Seamless Transfer

- To request a Seamless Transfer from super to Choice Income, you need to hold Term Deposits and/or Shares, ETFs and LICs. If you only hold funds in the Cash account, you cannot request a Seamless Transfer.
- Seamless Transfer does not realise any capital gains or losses. When you Seamless Transfer, any unused realised or unrealised capital losses will no longer be useable to offset future realised capital gains in Choice Income. Any unrealised capital gains liability will be reduced to zero, which could increase the value of your portfolio.
- You won't have access to trade, or be able to monitor investments while they're being transferred. The process to open a new Choice Income account and to transfer your Member Direct account can take up to 14 business days. You'll receive an email confirmation when the transfer is complete.
- Seamless Transfer cannot commence when certain types of corporate actions are pending.
- Limit orders must be completed or cancelled before requesting a Seamless Transfer.

- Seamless Transfer can only take place after your Choice Income account is set up. Your new Choice Income account won't start until all funds have been received. No investment earnings (which may be positive or negative in line with market movements) will apply during the transfer process.
- Tax is payable on accrued interest for any Term Deposits held up to the date of the transfer. This will be deducted from your super Cash account prior to the transfer. You must have sufficient funds in your super Cash account to pay for any tax due prior to the transfer being completed. Any automatic Term Deposit rollover selections you have made in your super account will be canceled and you will need to reselect these in your Choice Income account when the transfer is complete. The principal and interest earned for the full term will be paid into your Choice Income Cash Account when the Term Deposit matures.
- Funds in your Member Direct Cash Account will be transferred net of any fees and tax.
- When a Seamless Transfer from an AustralianSuper super account to an AustralianSuper Choice Income account is completed, the Terms and Conditions contained within this document continue to apply.

Refer to Member Direct Terms and Conditions at australiansuper.com/MemberDirectTCs

Financial advice

Transferring may not be the best option and, by making this form available, we are not recommending that you transfer. Please ensure you understand the impact on your tax position and seek financial advice. A professional financial adviser can help you understand whether Seamless Transfer makes sense for you. AustralianSuper can refer you to a financial adviser. For more information on your advice options with AustralianSuper call 1300 300 273 between 8am to 8pm (AEST/AEDT) weekdays or visit australiansuper.com/advice

Privacy Collection Statement

Please read this Privacy Collection Statement to see how Australian Super uses your personal information.

AustralianSuper Pty Ltd (ABN 94 006 457 987) of GPO Box 1901, Melbourne, Victoria, 3001, collects your personal information (PI) to operate, and administer your super account (including insurance) or retirement income account, improve our products and services and keep you informed. If we can't collect your PI we may not be able to perform these services. PI is collected from you but sometimes from third parties like your employer and your financial adviser (if applicable). We will only share your PI where necessary to perform our activities with our administrator (Australian Administration Services Pty Ltd, Link Group), service providers, as required by law or court/tribunal order, or with your permission. Your PI may be accessed overseas by some of our service providers and, where applicable to your circumstances, by third-party service providers of your financial adviser. Our Privacy Policy details how to access and change your PI, as well as our privacy complaints process. For complete details go to australiansuper.com/privacy or call us on 1300 300 273.

Open a Choice Income account



This form is for members who have an existing AustralianSuper Member Direct account and want to open a Choice Income account.

If you're below age 60 you MUST complete the Tax File Number declaration form and return it with this form. Please complete in pen using CAPITAL letters. Print (X) to mark boxes.

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4 Your AustralianSuper super account details

Please provide the details of the AustralianSuper super account/s you would like to transfer to Choice Income. You'll need a minimum of \$50,000 to open a Choice Income account.

Please fill in details for each AustralianSuper account

a) Your existing AustralianSuper member number	b) Do you want to transfer your entire balance?	 c) How much money do you want to leave in your AustralianSuper super account?^{2,3} 	d) Do you want to transfer a nominated amount to your Choice Income account? ^{2,3}
Account 1:	Yes¹ (go to step 5) No (go to either step 4c or 4d)	\$6,000 Other amount	\$
Account 2:	Yes¹ (go to step 5) No (go to either step 4c or 4d)	\$6,000 Other amount	\$
Account 3:	Yes¹ (go to step 5) No (go to either step 4c or 4d)	\$6,000 Other amount	\$

e) Do you want to Seamless Transfer your entire Member Direct account to your new Choice Income account? (Note: partial transfer is not available from Member Direct into Choice Income.)

Yes
No

By selecting 'Yes' I acknowledge that I:

- understand the possible tax outcomes
- have sought tax advice as needed
- understand that any term deposit automatic rollover selections that I have made will be canceled and I can reselect them after transfer is complete
- understand that I won't have access to trade, or be able to monitor investments, during the transfer process (which can take up to 14 business days).

By selecting 'No' your Member Direct holdings will remain in your super account.

¹ This will close your existing AustralianSuper account. Any insurance cover you have with this account will cease.

² When transferring from an AustralianSuper super account to open a Choice Income account, you'll need to leave a minimum balance of \$6,000 in your super account for it to remain open. To find out more about the minimum balance, visit **australiansuper.com/AccessYourSuper**

³ If you want to keep your insurance cover you'll need to have enough money in your super account to pay for it. To understand how to maintain cover, read our *Insurance in your super* guide at **australiansuper.com/InsuranceGuide**

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Let us know how you want to be paid

Tell us how much and how often you want to receive payments.

Your payments will start on the next available pay date, once your application is fully processed. This can take up to four weeks, or longer in some circumstances. Your payments are drawn from your balance in PreMixed and DIY Mix options. You're unable to withdraw payments from your balance in Member Direct. For details on payments see the *Choice Income Product Disclosure Statement* (PDS). You can change your payment options at any time by logging into your online account.

Statement (PDS). You can change your payment options at any time t	by logging into your online account.	
a) When I'd like to receive my payments: Please choose (X) one option of	nly, and fill in month and choose a start d	ate where applicable.
Fortnightly (next available payment date)		
Monthly. Choose one (x) start date:	28th soon as possible (next sched	luled payment date)
Quarterly from M M Choose one (*) start date: X 15th	28th soon as possible (next sched	luled payment date)
Half-yearly from MM Choose one (X) start date: 15th	28th soon as possible (next scheo	luled payment date)
Yearly from Choose one (X) start date: 15th	28th soon as possible (next scheo	luled payment date)
b) I'd like my payment amount to be: Please choose (X) one option of	nly.	
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Option 2: a specific amount ² for each payment \$		
For this specific amount, how much do you want this payment Choose one (X) below	amount to increase by each year? ³	
	Consumer Price Index (CPI)	
amount is determined by the actual amount rolled into your account, and is recalculat the PDS available at australiansuper.com/pds. You'll be paid this minimum amour payment amount will also be pro-rata (proportionate) by default in the first financia proportion of the minimum annual amount spread over the rest of that first financia If you choose an amount that is smaller than the minimum amount per financial year, of If no relevant box is selected for an annual increase in payment amount, the default of Choose your investments This allocation nominates how you wish to invest your Choice Income current Member Direct investments.	nt as the default option if no relevant boxes are s I year. This means that in your first financial yea I year. we'll contact you. otion is 0%.	selected. The minimum ar, you'll receive a
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X Yes. Fill in the percentage you want to invest	Investment option	% to invest in
in each investment option.	PreMixed options	
No. If you don't make an investment choice your account will be invested in the Balanced option (go to step 10).	High Growth	%
	Balanced	%
	Socially Aware	%
	Indexed Diversified	%
	Conservative Balanced	%
	Stable	
	DIV Mix options	

PreMixed options	
High Growth	%
Balanced	%
Socially Aware	%
Indexed Diversified	%
Conservative Balanced	%
Stable	%
DIY Mix options	
Australian Shares	%
International Shares	%
Diversified Fixed Interest	%
Cash	%
TOTAL MUST ADD UP TO 100%	100%

9 Nominate beneficiaries

You can choose only (X) one of three options when deciding what happens to your money when you die:

- Reversionary nomination You nominate a person who will receive your account balance as a regular income. Conditions apply for who you can nominate. For details see page 31 of the *Choice Income PDS*.
- Binding nomination You provide formal written direction to AustralianSuper to tell us who you want your account balance paid to. If valid, your nomination is legally binding.
- Non-binding nomination You nominate who you'd prefer your account to be paid to. This nomination is not legally binding. For details on nominating beneficiaries, see page 31 of the **Choice Income PDS**. Please choose (X) one option only.

Conditions apply for who you can nominate as a reversionary beneficiary. For details on their eligibility see page 31 of the Choice Income PDS. Last name	Option 1: Reversiona	•						s on theil	r ellaib	ility se	e nade 31
Last name Mr Mrs Ms Miss Dr			nate as a reve	rsionary b	eneficia	ry. Fo	or detail	0 011 011011	. 0.1.5.10	-	e page of
First name/s Relationship to you Date of birth Dip Min Y Y Y Y It's important to note that in some cases making a reversionary nomination may impact your Centrelink benefits. Contact the Department of Social Services at dss.gov.au if you have questions regarding your Centrelink entitlement Option 2: Binding nomination Please complete the Binding death benefit nomination form at the back of the PDS and attach it to this application. Leave the rest of this section of the form blank, and go to step 10 or step 11. Option 3: Non-binding nomination Please use the two decimal point spaces provided for the benefit percentages (% of benefit) section to add up to 100.00 Full name Relationship Residential address of benefit Department Departm		3,20.						Mr	Mrs	Ms	Miss Dr
Relationship to you Date of birth									X	X	X X
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12 Sign this form

In making this application:

- I declare that I have read the Member Direct Investment Option Guide and the Member Direct Terms and Conditions.
- I declare I have read and understood the Choice Income Product Disclosure Statement available at australiansuper.com/RetirementGuide
- I confirm I am either an Australian citizen/permanent resident, a New Zealand citizen or I hold an eligible retirement visa (subclass 405 or 410).
- To the best of my knowledge, the information I have provided on this form is correct.
- I acknowledge that my account will be set up based on the choices I've made as fully explained in the Choice Income Product Disclosure Statement, available at australiansuper.com/RetirementGuide
- If I've provided my email address and/or phone number, I consent to AustralianSuper sending me information about my account, AustralianSuper's products and services and marketing communications, including third-party products and services, via email, my online account, SMS, mobile app or phone, as appropriate and in accordance with AustralianSuper's Privacy Policy and my existing communication preferences. I understand I can change my communication preferences at any time by calling AustralianSuper on 1300 300 273 or through the Communication preferences section of my online account.
- I understand that the personal information I have provided will be used to open my account. I have read AustralianSuper's Privacy Collection Statement, available in the PDS and at **australiansuper.com/CollectionStatement** and I understand how AustralianSuper will use my personal information. I can also read AustralianSuper's Privacy Policy available at **australiansuper.com/privacy-policy** for full details on the collection and use of my personal information.

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Please return this completed form to AustralianSuper, Locked Bag 6, CARLTON SOUTH VIC 3053 Questions? Call 1300 300 273 or visit australiansuper.com/retirement