

Transferring your pension benefit from a UK scheme to NGS Super

Before completing this form please read the information sheet "Transferring your pension benefit from a UK scheme to NGS Super" available from NGS Super Customer Service Team on 1300 133 177 or refer to the NGS Super website www.ngssuper.com.au.

To transfer your UK pension benefit to NGS Super you'll need to become a member of NGS Super (if you are not already a member).

Step 1 – Complete your personal details

Please print in black or blue pen, in uppercase, one character per box. A

Title Mr Mrs Ms Miss Other Date of birth / /

Given names

Surname

Address

Suburb State Postcode

Telephone - Mobile -

E-mail

Membership number

Date you were last a UK resident for tax purposes / /



Step 2 – Provide details of your UK scheme

If you would like to give the trustee of NGS Super the authority to deal with your UK scheme directly, please provide the following details. A separate form should be completed if you are transferring benefits from more than one UK scheme. Note, if no details are provided, it will be assumed that you will contact your UK scheme directly to arrange the transfer of your UK benefit. The trustee will not take any further action until requested to by the UK scheme.

Name of the UK scheme

Address of UK scheme

Postcode

Contact person (if available)

Membership or policy number

National Insurance Number

Approximate value of UK benefit

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Step 3 – Sign the form

I understand that:

- I confirm that I am a member of NGS Super.
- in accordance with Australian legislation, the trustee of NGS Super may be unable to accept all or part of the benefit transferred from my UK pension scheme and may be required to return all or part of the amount transferred to my UK pension scheme.
- the trustee of NGS Super accepts no responsibility for any fees charged or losses incurred in the event that it is unable to accept any part of the benefit transferred and it is returned to my UK pension scheme.
- if I am a UK resident at the time the trustee of NGS Super makes a payment in respect of me (or have been a UK resident at any time in the previous 5 UK tax years), the trustee has an obligation to report details of such payments to the UK authorities.
- a UK tax liability could arise in relation to payments made in respect of me while I am a UK resident (or have been a UK resident at any time in the previous 5 UK tax years). I understand also that the UK authorities will bill me directly for any such tax and that I will be responsible for payment of such tax.
- if I elect to transfer part or all of my benefit in NGS Super (which may include a UK transfer amount) to any other superannuation fund in the future, it is my responsibility to check whether the new fund has been accepted as a QROPS.
- the trustee of NGS Super accepts no responsibility for any UK tax payable in relation to any payments made in respect of me.
- it is my responsibility to advise the trustee if there are any changes to the details of my UK residency status as advised on this form.
- information contained in this form will be used by the trustee to process my transfer. For this purpose, my personal information may pass between the trustee of NGS Super and its administrator, professional advisers, insurers, government bodies and other parties as required, including the trustee of any other super fund that my super is transferred to. I consent to the handling of my personal information in this manner. I can access my information by contacting the Privacy Officer of NGS Super.

I have read and understood the fact sheet "Transferring your pension benefit from a UK scheme to NGS Super".

Signature

Date

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The trustee of NGS Super recommends that you seek advice from a licensed, or appropriately authorised, financial adviser regarding your super before making a decision to transfer.

Please return your completed form to NGS Super, GPO Box 4303, Melbourne, VIC 3001.

