

Transfer authority form



Transfer whole balance from another fund into NGS Super

Just fill in this form and send it back to NGS Super. It's that simple. We'll contact your other super fund/s and will look after all of the transfer details. There's no fee for this service.

If you wish to transfer balances from more than one fund to NGS Super, you will need to complete a separate form for each transfer.

Your transfer will be processed faster if you provide your tax file number and a copy of a recent **Member Statement** from your other super fund.

If you need help

For assistance call us on **1300 133 177**.

Before you transfer

If required, ensure that you transfer or replace any insurance cover you have with your other fund before closing your account. Find out more at ngssuper.com.au/consolidate

Please send your completed form to:

NGS Super
GPO Box 4303
MELBOURNE VIC 3001

Step 1. Complete your personal details

Please print in black or blue pen, in capital letters.

NGS Member number Gender M F Title Date of birth / /

Given names

Surname

Residential address

Suburb State Postcode

Previous address
(if you know that the address held by your previous fund is different to your current residential address)

Suburb State Postcode

Daytime telephone -

Step 2. Provide details of your other super fund

If you have multiple accounts with your other fund, you must complete a separate form for each account you wish to transfer.

If you are intending to claim a tax deduction for any personal contributions you have made to your other super account, you should first complete the relevant form with your other fund to notify them of your intent to claim a tax deduction prior to requesting this transfer.

You may not be able to claim a tax deduction after this transfer occurs.

Find out more at ngssuper.com.au/deductions

FROM:

Other super fund

Fund name[^]

Fund phone number

 -

Membership or account number

Australian Business Number (ABN)

Unique Superannuation Identifier (USI)

[^] If you are transferring from another NGS Super account, for identification purposes, you **MUST** attach a certified copy of either your driver's licence (front and back) or passport (or acceptable alternatives). You can have these documents certified by a number of people including either a full-time teacher or by a post office employee with more than two years' continuous service. For a full list of people who can certify documents and acceptable alternative documents, please visit ngssuper.com.au/POI. An example of how to certify documents is shown in below in Step 3.

Self-managed super fund (SMSF)

SMSF name

Australian Business Number (ABN)

Unique Superannuation Identifier (USI)

Electronic Service Address

TO:

Fund name — NGS Super

Phone number — 1300 133 177

Member number

Australian Business Number (ABN) — 73 549 180 515

Unique Superannuation Identifier (USI) — 73549180515701

Step 3. How to certify documents

After sighting the original and the copy and making sure both documents are identical, the certifier must include on EACH page:

- written or stamped 'certified true copy'
- signature and printed full name
- qualification (such as Justice of the Peace, Australia Post employee with more than 2 years' continuous service, etc.)
- date (the date of certification must be within the 12 months prior to our receipt).

The diagram shows a document layout with callouts:

- Identification**: A clear copy of the document that identifies you (i.e. your driver's licence (**front and back**) or passport).
- J. Sample**: The authorised person's signature.
- Mrs Josi Sample
Justice of Peace
Registration No.123456789**: Full name, qualification and registration number (if applicable) of the authorised person.
- Date: 31/10/2023**: Date of certification (within 12 months of receipt by NGS).
- CERTIFIED TRUE COPY**: Write or stamp 'certified true copy' of the original document.

Verification

A verification of the certifying party may be performed. If a discrepancy arises, you may be requested to re-certify documentation.

Important note

The information in this document is a guide only and we may request additional documentation prior to any payment.

Step 4. Proof of identity

For transfers between super funds, your *previous* fund will verify your identification (ID) with the Australian Taxation Office (ATO). If the information held by your *previous* fund cannot be matched with the details held by the ATO, your *previous* fund may require you to provide certified proof of ID before they can complete your transfer to NGS Super.

Your tax file number (TFN) is required for identification purposes. Under super law, you are not obliged to disclose your TFN, but there may be tax consequences if you don't (please refer below for details).

My TFN is: - -

If you do not provide your TFN:

- your contributions may be taxed at the highest rate plus Medicare levy
- you will not be able to make personal contributions to your super fund
- we may not be able to receive contributions from you or your employer
- it may be more difficult for you to monitor your account or to locate it if you lose track of it.

NGS Super is authorised to collect your TFN under the *Superannuation Industry (Supervision) Act 1993*. We will treat it as confidential and only use it for lawful purposes. This includes disclosing it to another super fund when we're arranging a transfer of funds for you. However, you may request in writing that your TFN not be disclosed to any other trustee.

If you do not wish to provide your TFN then you will need to check with your *previous* fund to determine if you are required to provide certified ID. If you have more than one rollover, you will need to check the requirements with each of your previous super funds.

Step 5. Sign the form

By signing this form I am:

- aware I may ask my superannuation provider for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits, and I have obtained or do not require such information
- requesting consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect to this transfer
- discharging the superannuation provider of my transferring fund from all further liability in respect of the benefits paid and transferred to my receiving fund.

By signing this form I am making the following declarations:

- I declare that the information is true and correct.
- Where the transferring fund is an SMSF, I confirm that I am a member, trustee or director of corporate trustee of the SMSF.
- I have read and understand the **Privacy Collection Statement** available at ngssuper.com.au/pcs and consent to my personal information being collected, disclosed and used as described in that Statement.

I request and consent to the transfer of my superannuation as described within this form and authorise the super provider of each fund to give effect to this transfer.

Signature

Date

 / /

Please return your completed form to:

NGS Super
GPO Box 4303
MELBOURNE VIC 3001