



## Step 2. Provide details of your previous super fund

If you have multiple accounts with this 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 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 will not be able to claim a tax deduction after this transfer occurs.**

Name of previous fund or policy

  

Address of previous fund

  

Suburb

State

Postcode

Telephone

Membership or policy number

## Step 3. 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 superannuation law, you are not obliged to disclose your tax file number, 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 superannuation 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 4. Sign the form

By signing this form I am making the following statements:

- I declare I have fully read this form and the information completed is true and correct
- I discharge my *previous* super fund from any further liability in respect of the amount transferred
- I approve the deduction of any appropriate exit fees from the amount transferred subject to legislative restrictions
- I request that any further contributions received by my previous super fund after my payment, be redirected to my membership with NGS Super
- I am aware I may ask my *previous* super fund for information about any fees and charges that may apply, or any other information about the effect of this transfer on my benefits and do not require any further information
- If I intend to elect a different investment option for this transfer, then I understand that it is my responsibility to update my investment choice prior to this rollover being received by NGS Super
- I consent to my tax file number being disclosed for the purposes of consolidating my superannuation accounts
- I have read and understand the Privacy Collection Statement 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 above and authorise my previous super fund to give effect to this transfer.

Signature

Date   /   /

Please return your completed form to:

**NGS Super**  
**GPO Box 4303**  
**MELBOURNE VIC 3001**

### Information for previous superannuation provider

**Name of Fund:** NGS Super

**ABN:** 73 549 180 515

**SPIN:** NGS0001AU

#### Unique Superannuation Identifier (USI) numbers

Industry and Personal Division – 73549180515701

Catholic Church Staff Superannuation Defined Benefit Plan – 73549180515702

Eltham College Defined Benefit Plan – 73549180515703

Penleigh and Essendon Grammar School Defined Benefit Plan – 73549180515705

Cuesuper Superannuation Defined Benefit Plan – 73549180515706

Pension members – 73549180515799

**Fund Address:** GPO Box 4303, Melbourne, VIC 3001

**Fund Telephone Number:** 1300 133 177

When transferring money into NGS Super please note:

- NGS Super is a regulated super fund under the Superannuation Industry (Supervision) Act 1993. Accordingly NGS Super can accept the rollover of both preserved and non-preserved benefits in accordance with the Superannuation Industry (Supervision) Act.



# PRIVACY COLLECTION STATEMENT

## If you are a member of NGS Super, or you are applying for membership

We may collect your personal information from you or from third parties such as

- your employer
- a previous super fund
- your financial adviser
- our related entities
- publicly available sources.

We may be required or authorised by law to collect your personal information. Relevant laws include the Australian Securities and Investments Commission Act 2001, Corporations Act 2001, Family Law Act 1975 and laws relating to superannuation, taxation and anti-money laundering/counter-terrorism financing.

If we are unable to collect all the personal information we have asked for, we may not be able to administer your NGS Super account or take action on a particular request you have made.

**We will use your personal information to**

- manage your NGS Super account (*Accumulation, Transition to retirement or Income account*)
- give you information about your NGS Super account
- supply you with information about other products and services offered by us or our related companies
- include your relevant account data in statistics and market research.

**We will disclose your personal information to** various organisations (but only as required to manage your NGS Super account or the Fund generally), including

- our administrator, Mercer Outsourcing (Australia) Pty Ltd (Mercer)
- our insurer
- our professional advisers
- your employer
- other service providers that provide services or products relevant to your NGS Super account
- any relevant government authority that requires your personal information to be disclosed.

In managing your super your personal information may be disclosed to service providers in another country, most likely to Mercer's processing centre in India. Our Privacy Policy lists any other relevant offshore locations.

Our **Privacy Policy** sets out in more detail

- how we deal with your personal information
- how to access and seek correction of the information we hold about you
- how you may lodge a complaint if we breach an Australian Privacy Principle
- how we will handle any complaint.

You can view our Privacy Policy at

**[www.ngssuper.com.au/privacy-policy](http://www.ngssuper.com.au/privacy-policy)** or obtain a copy by contacting us on **1300 133 177**.

If you have any other queries in relation to privacy issues, or if you do not wish to receive marketing material, you may contact us on **1300 133 177**. You may also write to the NGS Super Privacy Officer at PO Box 21236 World Square NSW 2002 or online at **[www.ngssuper.com.au/contact-us](http://www.ngssuper.com.au/contact-us)**.

## If you are not a member of NGS Super, and you are not applying for membership

We will use your personal information only to enable us to take action on the particular matter you have contacted us about. In most instances we will not need to collect any further personal information from any other source. We will disclose your personal information only to those organisations mentioned above as are necessary to take action on the matter in question or for the management of the Fund generally.