

Rollover form – Mercer Super Trust Allocated Pension Division

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



Allocated Pension Division

Use this form to roll super money into the Allocated Pension Division of the Mercer Super Trust.

To rollover super money you will need to complete this form, sign and date it and send it with your completed application form to the Mercer Super Trust in the enclosed reply paid envelope. If you've super money with more than one previous super provider you'll need to complete a separate Rollover form for each amount and forward it with your completed application form to the Mercer Super Trust in the enclosed reply paid envelope. For each rollover received, we will establish a separate account in your name. Once your super money has been received and credited to your super account in your name, you'll receive confirmation from the trustee of the Mercer Super Trust.

If you need help

For assistance or to access the Privacy Policy and your personal information call the Helpline on 1800 671 369.

Step 1 – Complete your personal details

Title	Mr <input type="radio"/>	Mrs <input type="radio"/>	Ms <input type="radio"/>	Miss <input type="radio"/>	Date of birth	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Given names															
<input type="text"/>															
Surname															
<input type="text"/>															
Residential address															
<input type="text"/>															
Suburb										State		Postcode			
<input type="text"/>										<input type="text"/>		<input type="text"/>			
Postal address (if different to above)															
<input type="text"/>															
Suburb										State		Postcode			
<input type="text"/>										<input type="text"/>		<input type="text"/>			
Telephone					Mobile										
<input type="text"/>					<input type="text"/>										
E-mail															
<input type="text"/>															

Step 2 – Provide details of your previous super fund

Name of previous fund or policy														
<input type="text"/>														
Address of previous fund														
<input type="text"/>														
Suburb										State		Postcode		
<input type="text"/>										<input type="text"/>		<input type="text"/>		
Membership or policy number										Approximate value				
<input type="text"/>										\$ <input type="text"/> , <input type="text"/> , <input type="text"/>				



Your Privacy

We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information about the other products and services offered by us and our related companies. If you do not wish to receive marketing material, please contact us on **1800 671 369**.

Our Privacy Policy is available to view at mercersupertrust.com or you can obtain a copy by contacting us on **1800 671 369**.

If you do not provide the personal information requested, we may not be able to manage your superannuation.

We may sometimes collect information about you from third parties such as your employer, a previous super fund, your financial adviser, our related entities and publicly available sources.

We may disclose your information to various organisations in order to manage your super, including your employer, the fund's administrator, our professional advisors, insurers, our related companies which provide services or products relevant to the provision of your super, any relevant government authority that requires your personal information to be disclosed, and our other service providers used to assist with managing your super.

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

Our Privacy Policy sets out in more detail how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact us on **1800 671 369** or write to our Privacy Officer, **GPO Box 4303, Melbourne, VIC, 3001**.

Step 3 – Instructions to previous super provider & sign the form

I request that you transfer the total value held in respect of me for the above super fund or policy to the Allocated Pension Division of the Mercer Super Trust.

- I declare I have fully read this form and the information completed is true and correct
- I understand that on payment by my previous super fund, I discharge that 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 understand and consent to my information being collected, disclosed and used in the manner set out in this form.
- I understand that I will receive confirmation once my money has been received in the Mercer Super Trust.
- I understand that I have the right to ask my previous super fund for information that I reasonably require for the purpose of understanding any super entitlements I may have in that fund, including information about any fees and charges that may apply to the transfer and information about the effect of the transfer on any entitlements I have in my previous super fund. I confirm that I do not require such information from my previous fund.

Signature

Date

/ /

Notes for previous superannuation provider

Name of Fund: Allocated Pension Division - Mercer Super Trust **SFN:** 3297 429 55 **ABN:** 19 905 422 981 **USI:** 19905422981799

When transferring money in to Mercer Super Trust please note:

- Mercer Super Trust is a regulated super fund under the Superannuation Industry (Supervision) Act 1993. Accordingly the Mercer Super Trust can accept the rollover of both preserved and non-preserved benefits in accordance with the Superannuation Industry (Supervision) Act.
- Cheques should be made payable to **Mercer Super Trust (APD) – Account of [member's name]**
- Please forward:
 - this authority
 - the cheque
 - an ETP rollover statement
 - other associated documentation

Mercer Super Trust
GPO Box 4303
Melbourne VIC 3001

