



# Benefit transfer request

Please complete this form in black ink using **BLOCK** letters.

## 1. Member details

title	Mr	Mrs	Miss	Ms	other	
first name(s)						
last name						
date of birth				tax file number (TFN)		
Under the Superannuation Industry (Supervision) Act 1993, you are not obliged to disclose your TFN, but there may be tax consequences.						
Are you an Australian resident for tax purposes?    yes    no						
phone (after hours)				phone (business hours)		
mobile				fax		
email						
residential address						
suburb				state	postcode	
country						
previous address	If you know that the address held by your 'FROM' fund is different to your current residential address, please give details below.					
suburb				state	postcode	
country						

## 2. Fund details

FROM other provider		TO ETSL	
fund name		fund name	
fund postal address		membership or account number (if known)	
fund phone number		fund Australian business number (ABN) (if known)	
membership or account number			
Australian business number (ABN)			
Unique Superannuation Identifier (USI) (if known)			
transfer amount	full	partial	nominated amount \$
special instructions			

### 3. Proof of identity

I have attached a **certified** copy of my driver's licence or passport

or

I have attached **certified** copies of both:

Birth/Citizenship Certificate or Centrelink Pension Card

**AND**

Centrelink payment letter or Government notice (less than 12 months old) or local council notice (less than 3 months old).

#### Certification of personal documents

All copied pages of ORIGINAL proof of identification documents (including any linking documents) need to be certified as true copies by an individual approved to do so (see below).

The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (eg Justice of the Peace, Australia Post employee, etc) and date.

The following can certify copies of the originals as **true and correct** copies:

- a permanent employee of Australia Post with five or more years of continuous service
- a finance company officer with five or more years of continuous service (with one or more finance companies)
- an officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having five or more years continuous service with one or more licensees
- a notary public officer
- a police officer
- a registrar or deputy registrar of a court
- a Justice of the Peace
- a person enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia, as a legal practitioner
- an Australian consular officer or an Australian diplomatic officer
- a judge of a court
- a magistrate, or
- a Chief Executive Officer of a Commonwealth court

### 4. Authorisation

By signing this request form I am making the following statements:

- I declare I have fully read this form and the information completed is true and correct
- 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 do not require any further information.
- I discharge the superannuation provider of my 'FROM' fund of all further liability in respect of the benefits paid and transferred to my SAF fund.

I request and consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect to this transfer.

first name(s)	
last name	
signature	
	date



## Perpetual Small APRA Fund Service (SAF)

Equity Trustees Superannuation Limited ABN 50 055 641 757, AFSL 229757, RSE L0001458 (ETSL)

This compliance letter is for use by members of the Small APRA Fund Service.

# Compliance letter

To the Trustee

## Perpetual Small APRA Fund Service

Equity Trustees Superannuation Limited wishes to confirm that the trust deed to be used for the Small APRA Funds utilising this Service:

- Complies with the Superannuation Industry (Supervision) Act 1993 and Regulations ('SIS').
- Provides for benefits to be transferred into the Fund.
- Complies with the preservation requirements set out in SIS.

The Fund accepts all contribution types, including superannuation guarantee contributions from any employer on behalf of a member.

As required the Fund will apply to the Australian Taxation Office for an Australian Business Number and/or to the Australian Prudential Regulation Authority for a Registrable Superannuation Entity number. Copies of the relevant application forms will be provided by us upon request.

Equity Trustees Superannuation Limited acts as trustee of the Fund.

Yours faithfully

**Directors,  
Equity Trustees Superannuation Limited**

Note: The above wording has been approved by the Australian Taxation Office as an acceptable notification that a fund is a complying fund.

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