

Transfer To Brighter Super

M03



right by your side

Consolidate your funds quickly and easily online. Simply log in to your Member Online account and click Add to my super – Find my super.

Alternatively, complete this form to transfer your super from another fund to Brighter Super. You will need to complete a separate form for each fund.

Personal Details Brighter Super respects your privacy. All personal information collected is protected in line with Brighter Super's Privacy policy.

Member number	Account number	Given name(s)		
Surname		Date of birth		/ /
Email		Phone number		
Residential address				
Suburb/town		State	Postcode	
Postal address (if different to above)		State	Postcode	Tax file number ¹

¹ For more information on providing your TFN please read the Important information located on page 4.

1 Transfer money from my other super fund

Please tick (✓) the applicable box(s) below.

I would like to close my other account and transfer the full benefit to Brighter Super.

I would like to transfer the partial amount of: \$, ,

Other fund details (Transferring fund) - all fields are mandatory

Fund name	Member number	
Unique Superannuation Identifier (USI)	ABN	
Full name listed with other fund (if different to above)		
Address listed with other fund (if different to above)		
Suburb/town	State	Postcode

To transfer your benefit to Brighter Super you must complete this section in full.

2 Transfer money from my SMSF

Please complete this section if you want to transfer funds from your Self Managed Super Fund (SMSF) into your Brighter Super account.

Please select (✓) the appropriate option below:

I would like to close my SMSF and transfer the full benefit to Brighter Super.

I would like to transfer the partial amount of: \$,,

! Important Information

The details you provide below must be an exact match to the SMSF details you have registered with the ATO.

To avoid potential delays please **provide a printout of the details registered** with the ATO for your SMSF that confirms the SMSF fund name, SMSF ABN, SMSF address, SMSF bank account and your ESA.

The information provided is used by Brighter Super to validate your SMSF with the ATO SMSF verification service and confirm that your SMSF is compliant. **If the details below are not an exact match, including upper and lower case the ATO will send a rejection message to us, and we will reject your transfer request.**

SMSF details (all fields are mandatory)

SMSF Fund name (case sensitive)	Member number
Australian Business Number (ABN)	Electronic Service Address (ESA)
Fund address	

You will need to provide us with sufficient information to verify your identity if we do not have your TFN.

I have attached a printout of the details I have registered with the ATO and my ESA provider for my SMSF.

3 Member declaration

By signing this form I am making the following statements:

- I declare that I have fully read this form and the information completed is true and correct.
- I am aware I must provide certified proof of identification to Brighter Super if I have not already given my TFN and do not provide it on this form.
- I consent to my tax file number being disclosed for the purpose of consolidating my account.
- I am aware that I must post or email this form to Brighter Super in order for my transfer to be processed.
- I am aware that I may ask the trustee of my old superannuation fund for all the information I need to understand my benefit entitlements in that fund (including information on exit, transfer, withdrawal and other fees, insurance, investment options and the effect of a transfer on those benefit entitlements) AND I do not require any further information and authorise the transfer of my super from another fund to Brighter Super.
- I am aware of and authorise the deduction of transfer/exit/withdrawal fees by my old fund (if any) and any tax payable from the benefits transferred (subject to legislative restrictions).
- I discharge the trustee of my old superannuation fund from any further liability in respect of the benefits paid and transferred to Brighter Super.
- Brighter Super is acting on my behalf on this transfer and I consent to them holding my personal information relevant to the transfer.

Please sign on the following page

From 1 July 1995, the Board elected that the Local Government Superannuation Scheme (Brighter Super) be registered as a “Regulated Fund” under Superannuation Industry Supervision (SIS) legislation. The Board believes Brighter Super has complied with the SIS provisions since that date.

Signature	Date signed / /
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If you are signing this form on behalf of the member please complete the below section.

4 Power of attorney signature

Complete this section if you are signing this form on behalf of the member in your capacity as the member’s attorney.

By signing this form you are declaring that:

- you are nominated as an attorney on the member’s Power of Attorney document and are authorised to act on the member’s behalf for financial matters; and
- to the best of your knowledge and belief your appointment under the Power of Attorney document has not been revoked or otherwise withdrawn.

If more than one attorney has been appointed all attorneys will need to print their name, sign and date the form unless authorised to act severally.

Attorney 1	Signature	Date signed / /
Attorney 2	Signature	Date signed / /
Attorney 3	Signature	Date signed / /
Attorney 4	Signature	Date signed / /

Please sign in blue or black pen - Brighter Super does not accept digital signatures for attorney/s.

Please (✓) one of the options below:

- I have attached valid Power of Attorney documentation. Please read the **Power of Attorney** information on page 4
- I have previously supplied a valid Power of Attorney document to Brighter Super.

Now you have completed this form and signed the declaration, please send it to us by:

Preferred Method

Website (Secure file upload)
brightersuper.com.au/contact-us

Alternative Options

Email (scanned copy)
membership@brightersuper.com.au

Post
Brighter Super
GPO Box 264
Brisbane Qld 4001



Important information

1. Personal information

Brighter Super respects your privacy. All personal information collected on this form is protected in line with *Brighter Super's Privacy Policy*. To find out more about how we collect and manage your personal information, please refer to our *Privacy Policy* available from our website brightersuper.com.au.

2. Tax file number (TFN)

Under the *Superannuation Industry (Supervision) Act 1993*, Brighter Super is authorised to collect your TFN, which will only be used for lawful purposes.

These purposes may change in the future as a result of legislative change. Brighter Super may disclose your TFN to another superannuation provider, when your benefits are being transferred, unless you request to the trustee of your superannuation fund in writing that your TFN not be disclosed to any other superannuation provider.

It is not an offence not to quote your TFN. However giving your TFN to your superannuation fund will have the following advantages (which may not otherwise apply):

- Brighter Super will be able to accept all types of contributions to your account(s)
- other than the tax that may ordinarily apply, the tax on contributions to your superannuation account(s) will not increase
- other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your superannuation benefits
- it will make it much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits. We may disclose your TFN to an authorised external service provider to assist in this process.

More information on Tax File Numbers for superannuation purposes can be obtained from the ATO on 13 10 20.

3. Power of Attorney

You can appoint an Attorney to step in and manage your own affairs in case you're unable to do so - for example, you may be traveling, or ill, or have had an accident. Appointing someone as your power of attorney requires you to draw up legal documents about the responsibilities you're happy to entrust to others.

For a Power of Attorney (PoA) to be accepted, we require the forms to be posted through to us at **GPO Box 264, Brisbane QLD 4001** along with supporting documents for you and your attorney(s). **Please ensure your documents have been certified on each page**

The supporting documents required will differ depending on the legal document but may include:

- Certified photo identification for the attorney(s)
- Statutory declaration completed by the attorney confirming the Power of Attorney (PoA) has not been revoked.
- Medical evidence to confirm the member no longer has capacity to make financial decisions.