



MAC02  
04/12

## Application to pay in a transfer amount

### Get the facts first

Before completing this form, please read the **Product Disclosure Statement (PDS)** for Military Superannuation and Benefits Scheme (MilitarySuper), as well as the **Transfer amounts** factsheet which is available from the MilitarySuper website [militarysuper.gov.au](http://militarysuper.gov.au)

### Who should use this form?

Use this form if you are a current contributing member of the Defence Force Retirement and Death Benefits Scheme (DFRDB) or MilitarySuper and you wish to transfer money from another superannuation fund to MilitarySuper.

### When to use this form

Use this form:

- › To transfer other superannuation money you have. Complete this form and send it to your previous superannuation fund. If you have superannuation with more than one previous superannuation fund you will need to complete a separate form for each superannuation fund. Once your previous superannuation fund money has been received and credited to your MilitarySuper account, you will receive confirmation from us.

Additional forms can be obtained from the MilitarySuper website or by calling **1300 006 727**.

### Definitions

A **transfer amount** is a superannuation payment paid from another superannuation fund and can include:

- › an **Approved Deposit Fund**, which is a regulated superannuation fund holding Eligible Termination Payments
- › a **Regulated Superannuation Fund**, which is generally one that has elected to comply with Superannuation Industry (Supervision) legislation
- › a **Retirement Savings Account**, which is a superannuation product provided by banks, building societies, credit unions, life insurance companies or prescribed financial institutions
- › a **Special Account**, which is a superannuation account holding Superannuation Guarantee payments made by employers. This account is administered by the Australian Taxation Office (ATO).

A Superannuation Lump Sum Payment is generally a lump sum superannuation benefit. A PAYG Payment Summary shows the taxation components of a Superannuation Lump Sum Payment.

### Tax File Number

If you have not provided MilitarySuper with your Tax File Number (TFN) you may pay a higher rate of tax on contributions.

If you have not been issued a TFN you should lodge an ATO Application/Enquiry form with the Taxation Office. Forms are available at all Taxation Offices. You must provide proof of identity at the time you lodge the form.

Once the ATO has issued you with a TFN, please provide details in writing to MilitarySuper. You can do this by writing to:

**MilitarySuper**  
**GPO Box 2252**  
**Canberra ACT 2601**

*You do not need to return this page with your form.*

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Any financial product advice in this document is general advice only and has been prepared without taking account of your personal objectives, financial situation or needs. Before acting on any such general advice, you should consider the appropriateness of the advice, having regard to your own objectives, financial situation or needs. You may wish to consult a licensed financial advisor.

Commonwealth Superannuation Corporation (CSC) ABN: 48 882 817 243 AFSL: 238069 RSEL: L0001397  
Trustee of the Military Superannuation and Benefits Scheme (MilitarySuper) ABN: 50 925 523 120 RSE: R1000306  
Trustee of the Defence Force Retirement and Death Benefits Scheme (DFRDB Scheme) ABN: 39 798 362 763

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## Privacy

Personal information that you or a third party provide, such as your employer, is collected, held, used and disclosed as required or authorised by law in accordance with the privacy policies and notice, available via [dfrdb.gov.au](http://dfrdb.gov.au) or by contacting us on **1300 001 677**, for the purpose of managing your super. This includes the management of superannuation investments, providing superannuation products and information, the administration of accounts, conducting market research and product development. The privacy policies and notice contain important information about how personal information is handled, including rights to access and update that information and how a complaint about a breach of privacy can be made.

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## For more information

For more information about transfer amounts or how to complete this form please call **1300 006 727** (MilitarySuper) or **1300 001 677** (DFRDB).



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## Application to pay in a transfer amount

### PART A

### About yourself

1. Service  Navy  Army  RAAF

2. Scheme  MSBS  DFRDB

3. Service number/Employee ID

4. Salutation  Mr  Mrs  Ms  Miss  Other

Surname

Given name(s)

5. Date of birth  /  /

6. Postal address

SUBURB  STATE  POSTCODE

7. Phone number

BUSINESS HOURS

AFTER HOURS

MOBILE NUMBER

8. Email address

@

**PART B**

**Authorisation**

- 9. I request that my previous superannuation fund (as named in **Part C**) transfer the total value held in respect of me in the fund to MilitarySuper:
  - > I understand that on payment by my previous superannuation fund, I discharge that superannuation fund from further liability in respect of the amount transferred.
  - > I approve the deduction of any appropriate exit fees from the amount transferred.
  - > I agree that in certain cases MilitarySuper may be required under Law to deduct tax from the untaxed portion of the Superannuation Lump Sum Payment (if any).
  - > I understand that the benefit will be allocated to MilitarySuper and invested in my nominated investment choice. If I have not nominated an investment choice, all transfers will be invested in the Growth (default) strategy.
  - > I understand that information contained in this form will be handled by the trustee and administrator of MilitarySuper to process my transfer and that any personal information will be handled in accordance with the MilitarySuper Privacy Policy.
  - > I understand that I will receive confirmation once my money has been received into MilitarySuper.
  - > I acknowledge that I have been advised to read the PDS before completing this application form.

Your signature

SIGNATURE																			
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Date signed

<small>D</small>	<small>D</small>	/	<small>M</small>	<small>M</small>	/	<small>Y</small>	<small>Y</small>	<small>Y</small>	<small>Y</small>
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**PART C**

**About your previous fund**

10. Name of previous fund

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Previous fund membership number or policy number

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Previous fund address

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<small>SUBURB</small>																			

<small>STATE</small>			

<small>POSTCODE</small>					

Previous fund phone number

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**PART D**

**Document Checklist**

- 11. When you lodge this form, please provide the following document:
  - Certified copies of documents to prove your identity. Please contact your previous superannuation fund to confirm identification requirements they require to process your application.

## PART E

### Information for previous superannuation fund

**12. Name of scheme**

Military Superannuation and Benefits Scheme (MilitarySuper)

SFN: 258 636 942      ABN: 50 925 523 120      SPIN: CMS0103AU

**Trustee**

Commonwealth Superannuation Corporation

ABN: 48 882 817 243      AFSL Number: 238 009      RSE Number: L0001397

**Compliance**

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

**Payment Instructions:**

- › Cheques should be made payable to MilitarySuper – Account of (member's name)
- › Please forward this authority form, the transfer cheque, the Rollover Benefits Statement and any other associated documentation to:

**MilitarySuper**  
**GPO Box 2252**  
**Canberra ACT 2601**

## PART F

### Privacy

13.

- I do not want my contact details passed to a commissioned independent research firm for the purpose of participating in research on the service provided by CSC.

END FORM


 **EMAIL**  
members@enq.militarysuper.gov.au  
members@dfrdb.gov.au

 **PHONE**  
1300 001 677

 **FAX**  
MilitarySuper: (02) 6272 9617  
DFRDB: (02) 6272 9616

 **WEB**  
militarysuper.gov.au  
dfrdb.gov.au

 **OVERSEAS CALLERS**  
MilitarySuper: +61 2 6272 9623  
DFRDB: +61 2 6272 9624

 **POST**  
MilitarySuper/DFRDB  
GPO Box 2252  
Canberra ACT 2601