

Consolidating your super

By completing this form, you will initiate a rollover or request to transfer your super benefits between funds.

This form will **not** change the fund to which your employer pays your contribution. The 'Superannuation Standard choice' form must be used by you to change funds.

Before completing this form, please read the important information below.

Important information

This transfer may close your account (you will need to check this with your fund). This form CANNOT be used to:

- transfer benefits if you don't know where your superannuation is
- change the fund to which your employer pays contributions on your behalf (known as choice), or
- open a superannuation account, or transfer benefits under certain conditions or circumstances; for example, if there is an interest split or payment flag in operation under the *Family Law Act 1975*.

Checklist

- Check** that you have completed all sections and fields marked with an asterisk
- Sign** and date the authorisation in section 4
- Send** the form (no stamp required) to:
CONSOLIDATE MY SUPER
REPLY PAID 27
SYDNEY NSW 2001

Transfers from Self-Managed Super Funds (SMSFs)

We can only accept transfers from SMSFs via SuperStream due to regulatory requirements. This means your SMSF will need:

- an Australian Business Number (ABN)
- an Electronic Service Address (ESA) alias.

Please contact your ESA provider to facilitate your rollover and ensure the SMSF details held by the ATO are up-to-date including bank account information.

What happens to your future employer contributions?

Using this form to transfer your benefits will not change the fund to which your employer pays your contributions and may close the account you are transferring your benefits from.

Things you need to consider when transferring your superannuation

When you transfer your super, your entitlements under that fund may cease. You need to consider all relevant information before you make a decision to transfer your super. If you ask for information, your super provider must give it to you. Some of the points you may consider are:

- **Fees** – your **FROM** fund must give you information about any fees they charge. If you are not aware of the fees that may apply, you should contact your fund for further information before completing this form. Differences in fees funds charge can have a significant effect on what you will have to retire on. For example, a 1% increase in fees may significantly reduce your final benefit.
- **Insurance** – your **FROM** fund may insure you against death, illness or an accident which leaves you unable to return to work. If you choose to leave your current fund, you may lose any insurance entitlements you have. AIL may not offer you insurance or may require you to pass a medical examination before we cover you. You may wish to check the costs and amount of any cover offered by AIL.
- **Tax deductions** – if you are planning to claim a tax deduction for super contributions made to your **FROM** fund, you should submit your Notice of Intent, and receive acknowledgment from that fund, before you request a transfer of your super. If you transfer your super first, you will lose the ability to claim a tax deduction.
- **Spouse contribution splitting** – if you are planning to split contributions made to your **FROM** fund, to your spouse's superannuation, complete the spouse contribution splitting process before you request to transfer your remaining super.

18 November 2023

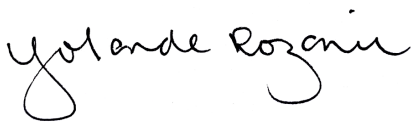
To whom it may concern

FirstChoice Wholesale Personal Super and FirstChoice Wholesale Pension compliance advice

FirstChoice Wholesale Personal Super and FirstChoice Wholesale Pension are both parts of the Colonial First State FirstChoice Superannuation Trust ('the Fund'). The Fund is a complying, resident, regulated superannuation fund and is constituted under a trust deed dated 29 April 1998. The trustee of the Fund is Avanteos Investments Limited ('the trustee').

In the event that the Fund's complying status was revoked the trustee would receive notice to that effect under section 63 of the Superannuation Industry (Supervision) Act. The trustee confirms that it has not received nor does it expect to receive any such notice.

Yours faithfully



Yolande Rozanic

Executive Director, Customer Operations

For and on behalf of the trustee, Avanteos Investments Limited

Consolidate my super

SAVE FORM

PRINT FORM

Rollover initiation request to transfer superannuation benefits between funds

This form will NOT change the fund to which your employer pays your contributions.

You should contact your other super fund to find out if there are any fees, charges or other consequences for transferring your super out of that fund, such as loss of insurance cover, if requesting a full balance transfer.

USE BLACK OR BLUE PEN AND CAPITAL LETTERS.

*These fields are mandatory.

WARNING: If you are transferring insurance from your other fund, please do not return this form to us until you have been notified by us that we have accepted the insurance transfer.

1 YOUR PERSONAL DETAILS

*Name

*Gender

M F

*Date of birth

(dd/mm/yyyy)

Tax File Number

Under the Superannuation Industry (Supervision) Act 1993, you are not obliged to disclose your tax file number, but there may be tax consequences. Refer to the product disclosure statement for more information.

*Contact phone number

2 DETAILS OF YOUR COLONIAL FIRST STATE FUND - 'TO' FUND

*Fund/product name

*Account/member number

Unique Superannuation Identifier (USI)

⚠ Refer to your last statement for account information, or call us on 13 13 36.

3A DETAILS OF YOUR OTHER SUPER FUNDS - 'FROM' FUNDS

These are the funds you are moving out of. You can use this form to transfer up to five super funds to your Colonial First State fund. If you have more than five super funds to transfer, please complete a separate form.

If you are transferring insurance from your other fund, please do not return this form to us until you have been notified by us that we have accepted the insurance transfer.

*Your other super fund/product name

*Account/member number

Unique Superannuation Identifier (USI)

Full rollover Partial rollover Transfer amount (only complete for partial rollovers) \$

*Your other super fund/product name

*Account/member number

Unique Superannuation Identifier (USI)

Full rollover Partial rollover Transfer amount (only complete for partial rollovers) \$

*Your other super fund/product name

*Account/member number

Unique Superannuation Identifier (USI)

Full rollover Partial rollover Transfer amount (only complete for partial rollovers) \$

3A DETAILS OF YOUR OTHER SUPER FUNDS – ‘FROM’ FUNDS (CONTINUED)

*Your other super fund/product name

*Account/member number

Unique Superannuation Identifier (USI)

Full rollover Partial rollover Transfer amount (only complete for partial rollovers) \$

*Your other super fund/product name

*Account/member number

Unique Superannuation Identifier (USI)

Full rollover Partial rollover Transfer amount (only complete for partial rollovers) \$

3B DETAILS OF YOUR SELF-MANAGED SUPER FUND (SMSF) – ‘FROM’ FUND

*Your SMSF name

Account/member number

*Australian Business Number (ABN)

*Electronic Service Address (ESA) alias

Full rollover Partial rollover Transfer amount (only complete for partial rollovers) \$

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 I have obtained or do not require any further information.
- I consent to my tax file number being disclosed for the purposes of consolidating my account.
- I discharge the superannuation provider of my FROM fund of all further liability in respect of the benefits paid and transferred to my TO 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.
- If I have applied to transfer my insurance cover, I request that my super only be consolidated once the insurer has made a decision in relation to that application.
- Where my other fund is an SMSF, I confirm that I am a member.

Original signature of member

Print name

Date signed

 (dd/mm/yyyy)