





## COMPLETING PROOF OF IDENTITY

You will need to provide documentation with this request to prove you are the person to whom the superannuation entitlements belong.

### Acceptable documents

The following documents may be used.

| EITHER  | OR   | AND  |
|---|--|--|
| <p><b>One of the following documents only:</b></p> <ul style="list-style-type: none"> <li>• driver's licence issued under State or Territory law</li> <li>• passport</li> </ul> | <p><b>One of the following documents:</b></p> <ul style="list-style-type: none"> <li>• birth certificate or birth extract</li> <li>• citizenship certificate issued by the Commonwealth</li> <li>• pension card issued by Centrelink that entitles the person to financial benefits</li> </ul> | <p><b>One of the following documents:</b></p> <ul style="list-style-type: none"> <li>• letter from Centrelink regarding a Government assistance payment</li> <li>• notice issued by Commonwealth, State or Territory Government within the past twelve months or local council within the past 3 months that contains your name and residential address.</li> </ul> <p>For example:</p> <ul style="list-style-type: none"> <li>– Tax Office Notice of Assessment</li> <li>– Rates notice from local council</li> </ul> |

### Have you changed your name or are you signing on behalf of another person?

If you have changed your name or are signing on behalf of the applicant, you will need to provide a certified linking document. A linking document is a document that proves a relationship between two (or more) names.

The following table contains information about suitable linking documents.

| Purpose                           | Suitable linking documents   |
|-----------------------------------|--|
| Change of name                    | Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office. |
| Signed on behalf of the applicant | Guardianship papers or Power of Attorney   |

### 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 any 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 persons can certify copies of the original as **true and correct** copies. This is not a complete list. For a full list of individuals who can certify documents, go to Prime Super's website at [www.primesuper.com.au](http://www.primesuper.com.au):

- a Prime Super Regional Manager (RM);
- a permanent employee of Australia Post with 2 or more years of continuous service;
- a finance company officer with 2 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 2 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.



### WHAT HAPPENS TO MY FUTURE EMPLOYER CONTRIBUTIONS?

Using this form to transfer your benefits will not change the fund to which your employer pays your contributions but may terminate your membership of the fund you are transferring your benefits **FROM**.

If you wish to change the fund into which your contributions are being paid, you will need to speak to your employer about choice of fund. For the appropriate forms and information about whether you are eligible to choose the fund to which your employer contributions are made, visit [www.ato.gov.au/super](http://www.ato.gov.au/super) or call the Australian Taxation Office on **13 10 20**.

### THINGS YOU NEED TO CONSIDER WHEN TRANSFERRING YOUR SUPERANNUATION

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

- **Fees** – your **FROM** fund must give you information about any exit or withdrawal fees. If you are not aware of the fees that may apply, you should contact your fund for further information before completing this form. The fees could include administration fees as well as exit or withdrawal fees. Prime Super does not charge establishment or contribution fees on transfer. 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.
- **Death and disability benefits** – 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 fund, you may lose any insurance entitlements you have. Other funds may not offer insurance, or may require you to pass a medical examination before they cover you. When considering a new fund, you may wish to check the costs and amount of any cover offered.
- If your **FROM** fund is not a public offer fund, you may not be able to rejoin that fund.

### WHAT HAPPENS IF I DO NOT QUOTE MY TFN?

Under the *Superannuation Industry (Supervision) Act 1993*, your superannuation fund 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. The trustee of your superannuation fund may disclose your TFN to another superannuation provider, when your benefits are being transferred, unless you request in writing to the trustee of your superannuation fund 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):

- your superannuation fund will be able to accept all types of contributions to your account(s);
- any concessions on contributions to your superannuation account(s) will be taxed at a lower rate;
- other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your superannuation benefits; and
- it will make it much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

Your TFN will otherwise remain confidential.

### WHERE TO SEND THIS FORM

Once completed please return this form to us via mail, fax or email.

**Mail** Prime Super  
Locked Bag 5103  
Parramatta NSW 2124

**Freecall** 1800 675 839  
**Fax** 1800 023 662  
**Email** [administration@primesuper.com.au](mailto:administration@primesuper.com.au)

If you have any questions about this form or Prime Super please call us on **1800 675 839** (8.00am to 8.00pm Monday-Friday Sydney time).

