

Consolidating your super

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

You must use the Schedule 2B to transfer your benefits to your own self-managed super fund (SMSF).

This form will **not** change the fund to which your employer pays your contribution. The *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 a superannuation agreement under the Family Law Act 1975 in place.

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 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 fees. Colonial First State may also charge entry 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.
- **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. Colonial First State 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 Colonial First State.

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



Colonial First State Investments Limited
11 Harbour Street
Sydney NSW 2000
Telephone 02 9303 3000
Facsimile 02 9303 3200
colonialfirststate.com.au
Investor Services 13 13 36

16 May 2016

To whom it may concern

FirstChoice Wholesale Personal Super, FirstChoice Personal Super, FirstChoice Employer Super and Rollover & Superannuation Fund compliance advice

FirstChoice Wholesale Personal Super, FirstChoice Personal Super and FirstChoice Employer Super are all part of the Colonial First State FirstChoice Superannuation Trust and Rollover & Superannuation Fund is a part of the Rollover and 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 Colonial First State 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

A handwritten signature in black ink, appearing to be "Scott Henricks", written in a cursive style.

Scott Henricks
General Manager, Client Operations

For and on behalf of the trustee, Colonial First State Investments Limited

Colonial First State Investments Limited ABN 98 002 348 352 AFS Licence 232468 ('Colonial First State') is the issuer of investment, superannuation and pension products. Interests in superannuation and pension products are issued from the Colonial First State FirstChoice Superannuation Trust ABN 26 458 298 557, Colonial First State Rollover & Superannuation Fund ABN 88 854 638 840 and the Colonial First State Pooled Superannuation Trust ABN 51 982 884 624. Colonial First State is a subsidiary of the ultimate holding company Commonwealth Bank of Australia ABN 48 123 123 124 AFS Licence 234945 ('the Bank'). The Bank or its subsidiaries do not guarantee the performance of the investments, retirement and superannuation products issued by Colonial First State, and they are not deposits or other liabilities of the Bank or its subsidiaries.

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.
USE BLACK OR BLUE PEN AND CAPITAL LETTERS.

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.

*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

Other/Previous names

*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 (if known)

Unique Superannuation Identifier (USI)

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

3 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.

Your other super fund

*Fund/product name

*Account/member number (if known)

Unique Superannuation Identifier (USI)

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

Your other super fund

*Fund/product name

*Account/member number (if known)

Unique Superannuation Identifier (USI)

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

Your other super fund

*Fund/product name

*Account/member number (if known)

Unique Superannuation Identifier (USI)

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

3 DETAILS OF YOUR OTHER SUPER FUNDS – 'FROM' FUNDS (CONTINUED)

Your other super fund

*Fund/product name

*Account/member number (if known)

Unique Superannuation Identifier (USI)

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

Your other super fund

*Fund/product name

*Account/member number (if known)

Unique Superannuation Identifier (USI)

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.

Disclosure authorisation (OPTIONAL)

Our super consolidation team is here to help you consolidate your super. To provide this service, we may need to contact the fund(s) which you are transferring from. By completing this section you authorise us to follow up your transfer request on your behalf. Colonial First State is sensitive to privacy issues and we treat all personal information we receive with the utmost care. For details on how we manage information, please refer to the Group's Privacy Policy available at www.commbank.com.au or call us on 13 13 36.

I hereby authorise full disclosure of my account information to Colonial First State.

Upon production of this document, a photocopy, or fax, I authorise you to:

- answer any correspondence from Colonial First State to the extent necessary to give effect to the proposed transfer
- provide any information as requested by Colonial First State via phone, fax or email relating to my accounts held with you.

Original signature of member

Print name

Date signed

(dd/mm/yyyy)