



Super Transfer Form – Partial balance

Request for partial rollover of the balance between funds
Under the Superannuation Industry (Supervision) Act 1993

Use this form to transfer a partial balance of your super from another fund before starting your Rest Pension account.

If you wish to transfer your whole superannuation balance, you will need to complete the 'Super Transfer Form – Whole Balance' form. For multiple transfers, complete a separate form for each benefit you wish to transfer.

You can complete this form electronically. If you'd prefer to print a paper copy, write in **CAPITAL** letters and use a **BLACK** or **BLUE** pen. This request will be invalid if unsigned and undated. Please allow up to 5 business days for your balance to be transferred.

Fields marked * are mandatory. If you do not complete all mandatory fields, there may be a delay in processing your request. Once you've completed and signed this form, please mail to: **Rest Pension, Locked Bag 5042, Parramatta NSW 2124**, or email to pension@rest.com.au

Step 1: Your details

Title* Given name(s)* Surname*

Date of birth(dd/mm/yyyy)* Gender (M/F)* Rest member number (if known)

Residential address

Unit number Street number* Street name*

Suburb/Town* State* Postcode*

Mobile number Daytime number (if different from mobile)

Email*

Postal address (if different from above)

Unit number Street number / PO BOX Street name

Suburb/Town State Postcode

Step 2: Tax File Number (TFN)

My Tax File Number (TFN)

Under the **Superannuation Industry (Supervision) Act 1993**, you are not obliged to disclose your Tax File Number, but there may be tax consequences. Please read the 'Why am I asked to provide my Tax File Number?' section of the Rest Pension Product Disclosure Statement (PDS) or go to visit.rest.com.au/facts-figures for more information.

Step 3: Details of other fund where your super is coming from

Name of fund where money is held*

Unique Superannuation Identifier (USI) of fund (non-SMSF)

Australian Business Number (ABN)

Providing the ABN and USI can prevent rollover delays. Generally, the ABN and USI for your previous fund are available from the fund's website or Product Disclosure Statement.

Other fund member number/policy number

Is the fund a self-managed super fund (SMSF)?

 No Yes – provide Electronic Service Address (ESA)

ESA for your SMSF is available through an SMSF messaging provider or SMSF intermediary such as an administrator, tax agent or accountant. For more information about ESA, visit ato.gov.au.

Step 4: Transfer details

Please fill in the amount you wish to transfer:*

A partial amount of \$

Note: Your previous super fund may charge an exit fee for this transfer. Please check with the administrator of your previous super fund for details of any such fees. No entry fee will be charged by Rest to accept this benefit.

Step 5: Declaration and signature

By signing this declaration, I am making the following true and correct statements:

- I authorise the transfer of my benefits, as specified above, from my other super fund to Rest Pension.
- I approve the deduction of any applicable transfer fees, exit fees and taxes from the benefit being transferred (subject to legislative restrictions).
- I am aware that I may ask my superannuation provider for information about any fees or charges that may apply, or any information about the effect this transfer may have on my benefits, and I have obtained or do not require such information.
- I understand that I may lose any insurance entitlements from my other super fund.
- I understand that, in certain circumstances, the trustee may be required to deduct tax from the untaxed portion of any amount transferred.
- I understand and acknowledge the implications and effects of transferring my benefits from my other super fund to Rest Pension.
- I consent to my Tax File Number being disclosed for the purposes of consolidating my account.

Name (Please print in CAPITAL letters)*

Please sign here*

Date of signature (dd/mm/yyyy)*

If signing electronically, I consent to the use of the electronic signing method and intend for my electronic signature to have the same force and effect as a wet ink signature. Note: If you need to make any changes, you will need to start the form again.

Rest Pension

Locked Bag 5042
Parramatta NSW 2124
USI: RES0102AU
ABN: 62 653 671 394

Rest is a complying, resident, regulated superannuation fund within the meaning of the Superannuation Industry (Supervision) Act 1993 (SIS). The Trustee certifies that the Fund is not subject to a direction under Section 63 of SIS.

Your Privacy

Your privacy is important to us. Our Privacy Policy sets out how your personal information is managed, and is available at rest.com.au/privacy-policy.