

# Premium Portfolio Service – Super Rollover authority

Macquarie Investment Management Limited ABN 66 002 867 003 AFSL 237492 RSEL L0001281.  
Macquarie Superannuation Plan ABN 65 508 799 106 RSE R1004496.

## Use this form to roll your superannuation benefits into your Premium Portfolio Service – Super Account.

- Do not cancel any existing insurance cover until your application for insurance has been assessed and accepted by the insurer. If you do not want your current insurance cover cancelled, do not complete this rollover authority.
- Ensure that your existing investment is clearly detailed below for the institution from which you are transferring.
- You do not need to complete this form if you are transferring from another account within the Macquarie Superannuation Plan.
- Rolling over your super benefit to Macquarie may limit your ability to lodge or vary a deduction notice for personal contributions made to the fund from which you are transferring.
- If you have multiple accounts, please complete a separate form for each account you wish to transfer.
- Please complete, sign and return this request to Macquarie.

## 1. Personal details

Title: Full given name(s):

Surname:

Account number:

Gender: Male Female Date of birth:

### Postal address

Street number and name or PO Box:

Suburb: State: Postcode:

### Residential address (leave blank if the same as your mailing address)

Street name and number:

Suburb: State: Postcode:

**If your personal details have changed, you may need to contact your existing superannuation provider and update their records before they action this authority.**

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## 2. Rollover details

**Please contact your existing superannuation provider to confirm if they have any additional requirements before they can action this rollover authority. Please complete all details and ensure that you provide us with a valid Australian Business Number (ABN) and Unique Superannuation Identifier (USI). Any missing information may delay processing of your rollover.**

To (paying institution):

Street name and number:

Suburb:

State:

Postcode:

Phone number (paying institution):

Account/membership/policy name:

Account/membership/policy number:

ABN:

USI:

Does this rollover contain a death benefit?

Yes

No

*Note: You cannot combine your existing benefits with a death benefit rollover.*

Amount to be transferred:

Entire balance (your account will be closed)

If partial amount, please specify\*: \$

Account receiving the transfer:

Premium Portfolio Service – Super Account (USI – 65508799106031)

Premium Portfolio Service – Pension Account (USI – 65508799106032)

## 3. Declaration and signature

I hereby request that the rollover institution named above complete the transfer of benefits from my account/policy to Macquarie Investment Management Limited (MIML) ABN 66 002 867 003 AFSL 237 492 as trustee of the Macquarie Superannuation (SFN 266 912 946, ABN 65 508 799 106), a superannuation fund established to comply with the requirements of the Superannuation Industry (Supervision) Act. By giving this authorisation to transfer my benefits:

- I hereby give the rollover institution named above authority to provide any and all relevant information to MIML.
- I discharge the trustee of the paying fund from any further liability in respect of the superannuation benefits transferred to MIML.
- I am aware that I may ask the trustee of my previous fund for information to understand any benefit entitlements that I may have, including information about any fees or charges that may apply to the rollover, or information about the effect of the rollover on any benefit entitlements I may have, and I do not require any further information.
- I authorise the deduction of any withdrawal and/or termination fees that may be applicable as a result of the transfer.

**Signature:**

Name:

Date:

\* Any amendments to this section must be signed in full.

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	SPIN	USI	
Premium Portfolio Service – Super Account	MAQ0157AU	65508799106031	SFN 266 912 946
Premium Portfolio Service – Pension Account	MAQ0158AU	65508799106032	ABN 65 508 799 106

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In reference the above superannuation fund, we confirm that:

1. The trustee of the Fund is an approved trustee by the Australian Prudential Regulation Authority under the Superannuation Industry (Supervision) Act 1993 (SIS).
2. The Fund is a regulated superannuation plan for the purposes of SIS.
3. It is the intention of the trustee that the Fund will be administered so that it will be taxed as a complying superannuation fund.
4. The trust deed of the Fund allows benefits to be transferred to the Fund and the Fund can accept and hold preserved benefits in the manner prescribed under SIS.
5. The trust deed of Fund allows the Fund to accept contributions, including employer contributions.

**Macquarie Investment Management Limited**  
**as trustee for the**  
**Macquarie Superannuation Plan**