

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 via SuperStream into your Macquarie Superannuation account.

You do not need to complete this form if you are transferring from another account within the Macquarie Superannuation Plan.

Important

- 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.
- 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.



Please note: Rollovers from external super funds into Macquarie Super accounts must be initiated via Adviser Online. Paper forms will only be accepted for requests that can't be completed digitally.

1. Macquarie account details

Account number

Member details

All name provided must be your legal full name

Given name(s):

Surname:

Date of birth:

Gender:

Male Female

Postal address

Street number and name:

City/Suburb:

State/Territory:

Postal code:

Residential address

(leave blank if the same as your postal address)

Street number and name:

City/Suburb:

State/Territory:

Postal code:

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

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.

Paying fund name and address

Fund name:

Street name and number:

City/Suburb:

State/Territory:

Postal code:

Paying fund details

ABN:

USI:

Phone number:

Paying fund account details

Account/member name:

Account/member number:

Are you rolling over the entire balance of your account?

Yes (your account will be closed)

No. Please rollover the following amount:

\$

Does this rollover contain a death benefit?

Yes. Note, you cannot combine your existing benefits with a death benefit rollover.

No

Macquarie account receiving the rollover:

Macquarie Super Manager (USI - 65508799106031)

Macquarie Pension Manager (USI - 65508799106032)

Macquarie Super Manager II (USI - 65508799106185)

Macquarie Pension Manager II (USI - 65508799106186)

Macquarie Super Consolidator (USI - 65508799106172)

Macquarie Pension Consolidator (USI - 65508799106173)

Macquarie Super Consolidator II (USI - 65508799106172)

Macquarie Pension Consolidator II (USI - 65508799106173)

Macquarie Super Accumulator (USI - 65508799106041)

Macquarie Super - Vision (USI - 65508799106172)

Macquarie Pension - Vision (USI - 65508799106173)

Premium Portfolio Service - Super Account (USI - 65508799106031)

Premium Portfolio Service - Pension Account (USI - 65508799106032)

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

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 Plan (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:




Full name:

Date:

Sign

- Wet signature, or
- Electronic signature from an approved provider.
Visit Help Centre to view our requirements.

Submit

-  **Advisers only** upload via Request Centre
-  **Clients only** email to wrapsolutions@macquarie.com
-  Mail to **GPO Box 4045, Sydney, NSW, 2001**

Need Help?

If you're an adviser, you can visit **Adviser Help Centre** or chat to us through Adviser Online

If you're a client, you can visit our **Personal Help Centre**, speak to your adviser, or call us on 1800 025 063

Macquarie Investment Management Limited

ABN 66 002 867 003 AFSL 237 492 RSEL L0001281

Macquarie Superannuation Plan ABN 65 508 799 106 RSE R1004496

**GPO Box 4045
Sydney NSW 2001****Email** wrapsolutions@macquarie.com**Website** www.macquarie.com.au

1 June 2024

TO WHOM IT MAY CONCERN

	SPIN	USI	
Macquarie Super Manager	MAQ0157AU	65508799106031	
Macquarie Pension Manager	MAQ0158AU	65508799106032	
Macquarie Super Manager II		65508799106185	
Macquarie Pension Manager II		65508799106186	
Macquarie Super Consolidator	MAQ0779AU	65508799106172	
Macquarie Pension Consolidator	MAQ0780AU	65508799106173	
Macquarie Super Consolidator II		65508799106172	SFN 266 912 946
Macquarie Pension Consolidator II		65508799106173	ABN 65 508 799 106
Macquarie Super Accumulator	MAQ0311AU	65508799106041	
Macquarie Super (Vision)	MAQ0779AU	65508799106172	
Macquarie Pension (Vision)	MAQ0780AU	65508799106173	
Premium Portfolio Service – Super Account	MAQ0157AU	65508799106031	
Premium Portfolio Service – Pension Account	MAQ0158AU	65508799106032	

In reference to 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 fund 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**