

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.

1. Macquarie account details

Account number

Account name

Member details

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

-  Upload to **Request Centre** (advisers 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

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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 ABN 65 508 799 106 |
| Macquarie Pension Consolidator II | | 65508799106173 | |
| 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