

# Roll in form

- ▶ Use this form to transfer other superannuation benefits into Enterprise Plan.
- ▶ Before transferring superannuation benefits to Enterprise Plan, you should consider:
  - Changes in your contact details between your From and To Super Fund.
  - Exit fees and any benefits you may be losing, such as insurance costs.
  - Investment performance.
  - If you should seek professional advice.
- ▶ This form will NOT change the fund to which your employer pays your contributions. A Choice of Fund form or instruction must be used by you to change the super fund your regularly contribute to.

## 1 Your personal details

Title	Given name(s)
<input type="text"/>	<input type="text"/>
Surname	Date of birth
<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>

## 2 Tax file number (TFN) (or exemption)\*

TFN	OR exemption reason
<input type="text"/>	<input type="text"/>

OR

I do not wish to quote a Tax File Number (TFN) or exemption reason.

*\* In order to receive any tax concessions available in relation to your entitlement, you are required to quote your TFN. Under superannuation legislation, it is not compulsory to quote your TFN, however if your TFN is not quoted, the Trustee is obliged to deduct PAYG Tax from the relevant part of your benefit at the top marginal rate. For further information, refer to the Enterprise Plan Product Disclosure Statement (PDS).*

## 3 Contact details

Residential address		
<input type="text"/>		
<input type="text"/>	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Previous address		
<input type="text"/>		
<input type="text"/>	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Phone (home)	Phone (work)	Mobile
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email		
<input type="text"/>		

**\* If you know that the address held by your FROM Super fund is different to your current residential address, please provide details.**

The information in this document has been prepared by OneVue Super Services Pty Ltd ABN (74 006 877 872), AFSL 246883 as the Fund Administrator. It is intended to provide you with general information only and does not take into account your personal objectives, financial situation and needs. Before making any decisions regarding your benefits in **Enterprise Plan sub Fund of the Executive Super Fund** ABN 60 998 717 367 (the Fund) it is important that you consider the current Product Disclosure Statement (PDS) relevant to your category of membership having regard to your own situation and needs. Copies of the various PDS' are available on the Enterprise Plan's website [www.enterpriseplan.com.au](http://www.enterpriseplan.com.au). You should consult a licensed or authorised financial adviser if you require advice that takes into account your personal circumstances.

#### 4 Rollover fund details

Member number

Fund name

Fund address

Fund ABN

Unique Superannuation Identifier (USI)

Fund telephone

#### 5 \$ Transfer details

Full transfer

 \$ (Approx)

Partial transfer

 \$ (Exact)

#### 6 Receiving fund details

Member number

Fund name

Fund address

Fund ABN

Unique Superannuation Identifier (USI)

Fund telephone

#### 7 Identification requirements

To complete the transfer of superannuation benefits to Enterprise Plan, please attach an original certified copy of identification to this form. For information on identification required, please refer to the Identification Requirements factsheet available at [enterpriseplan.com.au/forms & publications](http://enterpriseplan.com.au/forms & publications).

I have attached an originally certified copy of identification to this form.

#### 8 Declarations and signatures

By signing this form, I am making the following statements:

- I declare I have fully read this form and the information provided is true and correct, and authorise the release of all personal information to Enterprise Plan to facilitate the transfer of my benefit.
- I am aware I may ask my From and To superannuation fund for information about insurance and any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits, and do not require any further information.
- I discharge the superannuation provider of the fund I am transferring from of all further liability in respect of the benefits paid and transferred to Enterprise Plan.
- I request and consent to the transfer of superannuation as described in Section 4 of this form and authorise the superannuation provider of each fund to give effect to this transfer.

Full name

Signature

Date

## Enterprise Plan

### Certificate of Compliance

Enterprise Plan  
USI: 60 998 717 367 012  
ABN: 60 998 717 367

The Enterprise Plan is a sub plan of the Executive Superannuation Fund established in accordance with the Superannuation Industry (Supervision) Act 1993 (SIS). The Enterprise Plan is issued by Equity Trustees Superannuation Limited ABN 50 055 641 757, RSE Licence L0003094, AFSL No 229757, as Trustee for The Executive Superannuation Fund. ABN 60 998 717 367.

We certify that:

- The Trustee has lodged an irrevocable election for the fund to be a regulated superannuation fund within the meaning of Section 19 of SIS.
- The fund will be administered as a complying superannuation entity for the purposes of SIS. The Trustee has not received a notice of non-compliance from the Australian Prudential Regulation Authority.
- The Australian Prudential Regulation Authority has not directed the fund not to accept contributions or rollovers under Section 63 of SIS.

Yours Faithfully,

**Equity Trustees Superannuation Limited**

### Privacy Policy

When we collect your personal information, it is securely stored and will only be used and disclosed to authorised personnel, service providers and third parties in order to:

- Administer your superannuation account, make benefit payments or forward direct marketing.

For a copy of the Privacy Policy, visit [enterpriseplan.com.au](http://enterpriseplan.com.au) or contact us on 1800 816 575. Our Privacy Policy sets out how you can access information about your benefit and personal details, correct any information which is inaccurate or out of date and information on our privacy complaints process.

## Checklist

- **Have you completed all areas of this form?**
- **Have you signed and dated this form?**
- **Have you attached an original copy of certified identification to this form?**
- **Please send the completed form to:**

**Enterprise Plan, PO Box 1282, Albury NSW 2640**

### Contact us

**Phone:** 1800 816 575  
**Email:** [service@supermanagers.com.au](mailto:service@supermanagers.com.au)  
**Website:** [enterpriseplan.com.au](http://enterpriseplan.com.au)  
**Address:** PO Box 1282, Albury NSW 2640

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