

# Transfer Request and Authority Form



ClearView Superannuation & Roll-overs  
ClearView Pension Plan

Please print clearly in **BLOCK LETTERS**.

## Part A: Your details

### Section 1: Personal details

Title

Mr  Mrs  Ms  Miss  Dr

Other

Surname

Given name/s

Date of birth

Gender

Male  Female

### Section 2: Tax File Number

Under the Superannuation Industry (Supervision) Act 1993, you are not obliged to disclose your tax file number, but there may be tax consequences.

Tax File Number

### Section 3: Contact details

Residential address (cannot be PO Box address)

Suburb/Town

State

Postcode

Home phone

Mobile

Business phone

Fax

Email

Postal address (if different to the above)

Suburb/Town

State

Postcode

## Part B: Fund details

### Section 4: From fund

If you have multiple accounts, you must complete a separate form for each account you wish to transfer.

Fund Name

Australian Business Number (ABN)

Unique Super Identifier (USI)

Fund phone number

Membership or account number

### Section 5: To fund

Fund Name

Australian Business Number (ABN)

Unique Super Identifier (USI)

Fund phone number

Membership or account number

## Part C: Amount to transfer

Total value  Partial value

Note: If this section has not been completed your transfer will be the balance of your account

## Part D: Proof of Identity

I have provided my TFN for you to verify my identity via the ATO

AND

I have attached a certified copy of my:

- Current drivers licence or passport
- Birth/Citizenship Certificate, or
- Centrelink Pension Card AND Centrelink Payment letter or Government notice (less than 1 year old) with name/address.

If you are unable to meet the above 'Proof of Identity' requirements please contact us on 132 977.

## Part E: Authorisation

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

- I declare I have fully read this form and the information completed is true and correct.
- I am aware I may ask my superannuation provider for information on the effect this transfer may have on my benefits, and do not require any further information.
- If the TO fund is a self managed superannuation fund (SMSF), I confirm that I am a trustee (or director of a corporate trustee) of the SMSF.
- I discharge the superannuation provider of my FROM fund of all further liability in respect of the benefits paid and transferred to my TO fund.
- I authorise my Financial Planner and representatives of the Trustee of the ClearView Retirement Plan to make inquiries about this transfer on my behalf.
- I request and consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect to this transfer.

Signature

Date

## After completing this form

Sign the authorisation section and send this form along with a copy of your certified proof of identity documents to:

Mail:

ClearView  
Client Administration  
Reply Paid 4232  
Sydney NSW 2001

If you have any questions about this form, please call us on 132 977.

9 September 2010

TO WHOM IT MAY CONCERN

COMPLYING STATUS OF THE CLEARVIEW RETIREMENT  
PLAN SUPERANNUATION FUND NUMBER  
2664/049/48

CLEARVIEW SUPERANNUATION AND ROLL-OVERS  
UNIQUE SUPER IDENTIFIER (USI) - NRM0041AU  
ABN 45 828 721 007

CLEARVIEW PENSION PLAN  
UNIQUE SUPER IDENTIFIER (USI) - NRM0042AU  
ABN 45 828 721 007

ClearView Life Nominees Pty Limited is the Trustee of the ClearView Retirement Plan. The Trustee confirms that it agrees to accept rollovers and that as at the date of this notice the ClearView Retirement Plan:

1. Is a complying fund regulated as a 'public offer fund' under the Superannuation Industry (Supervision) Act 1993 ('SIS');
2. Can receive contributions, transfers and rollovers of preserved, restricted non-preserved and unrestricted non-preserved amounts;
3. Has provision under its governing rules providing that members can receive benefits once a condition of release is satisfied under SIS; and
4. Has not received, nor does it expect to receive, a notice stating the fund is other than a complying fund.

ClearView Contact Centre  
Phone 132 977