



National Preservation Trust

Transfer of Benefits to NPT

How to rollover your superannuation benefits in other plans to NPT

- To rollover your other plan's superannuation benefits into NPT please complete this form and send it directly to the address below.
- When completing this form please use black ink and write in BLOCK letters. Sample when completing the fields: A B 1 2
- Choice fields should be filled where applicable
- Please read the notes on the following pages carefully, to assist you with completing this advice.
- A separate form must be completed for each account balance you wish to transfer.**
- If you wish to roll over only PART of your benefits held in your previous superannuation plan to NPT, DO NOT use this form. Contact your previous fund to arrange this.

SECTION 1 - CURRENT MEMBERSHIP DETAILS OF NPT

Title	Date of Birth	Membership Number
<input type="text"/>	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>
Given Name(s)		
<input type="text"/>		
Surname		
<input type="text"/>		
Gender <input type="radio"/> Male <input type="radio"/> Female	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. See notes for further information.
	<input type="text"/> - <input type="text"/> - <input type="text"/>	
Home Phone Number	Work Phone Number	Mobile Phone Number
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email Address		
<input type="text"/>		
Address Line 1	Please select one option only: <input type="radio"/> Home <input type="radio"/> Postal	
<input type="text"/>		
Address Line 2		
<input type="text"/>		
Address Line 3		
<input type="text"/>		
Suburb / Town / City		
<input type="text"/>		
Country	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

Please return this form to NPT Administration,
P.O. Box 6003 Wollongong NSW 2500
Fund: National Preservation Trust ABN 15 759 987 889 SPIN NMS0100AU
Trustee: N.M. Superannuation Pty Ltd ABN 31 008 428 322 AFSL No. 234654
Freecall: 1800 331 210





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SECTION 2 - DETAILS OF YOUR PREVIOUS SUPERANNUATION PLAN

NOTE: A separate form must be completed for each account balance you wish to transfer.

Name of Previous Superannuation Plan Where Benefits Are Held

Postal Address of Previous Superannuation Plan

Suburb / Town / City

State

Postcode

Phone Number

SPIN

Membership Number in Previous Plan

Approximate Amount Held in Previous Plan (if known)

\$

Date Ceased With Below Employer

/ /

Name of Employer Contributing to Previous Plan

SECTION 3 - PROOF OF IDENTITY

See the notes regarding completing proof of identity.

I have attached a certified copy of my driver's licence or passport

OR

I have attached certified copies of **both**

Birth/Citizenship Certificate or Centrelink Pension Card

AND

Centrelink payment letter or Government notice (<1 year old) with name/address

SECTION 4 - PRIVACY & DECLARATION

Privacy

NPT collects your personal information to establish and run a NPT membership account in your name, to correspond with you and to provide you with superannuation benefits and options from NPT. If you choose not to give us your personal information, we may not be able to provide you with all NPT's benefit. You are able to gain access to your own personal information by request. If you have any questions about your rights under the privacy legislation, please call NPT on 1800 331 210.

Declaration

- I declare that I have fully read this form and the information provided is true and correct,
- I am aware that I may ask my previous superannuation fund for information on the effect this transfer may have on my benefits, and do not require any further information,
- I authorise NPT Administration to make arrangements with my previous superannuation plan to have benefits transferred into my account with NPT, and acknowledge that this notice is irrevocable; upon payment by the previous superannuation plan,
- I discharge the trustee of the previous superannuation plan from any further liability in respect of benefits transferred,
- I approve the deduction of transfer fees by my previous superannuation plan (if any) from the benefits transferred (subject to legislative restrictions),
- I request that any contributions received after payment of my benefit be rolled over to my account with NPT.

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

/ /



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INFORMATION FOR THE PREVIOUS PLAN ADMINISTRATOR

Compliance: The Trustee (N.M. Superannuation Pty Ltd) advises that NPT:

- is a regulated, resident complying superannuation fund within the meaning of the Superannuation Industry (Supervision) Act 1993 (SIS Act);
- is not subject to, and never has previously been subject to a direction under section 63 of the SIS Act and continues to satisfy all the requirements of the SIS Act; and
- accepts transferred and rolled over benefits with no minimum benefit amount from Trustees of other superannuation funds, Retirement Savings Account (RSA) providers, or the Australian Taxation Office (ATO).

Requirements of previous Plan Administrator:

- All cheques should be made payable to the National Preservation Trust and sent to NPT Administration, P.O. Box 6003, Wollongong, NSW, 2500. Phone: 1800 331 210
- If benefits are unable to be transferred to NPT, please notify NPT Administration as soon as possible so that the member can also be informed.
- NPT's Superannuation Fund Number is 2764 249 46. NPT's SPIN is NMS0100AU

NOTES

TRANSFER OF BENEFITS TO NPT (NOTES FOR MEMBERS)

By completing this form, you will request the transfer of the **WHOLE** balance of your previous superannuation fund to NPT. This form can **NOT** be used to transfer part of the balance.
This form will **NOT** change the fund to which your employer pays contributions.

AFTER COMPLETING THIS FORM

- Sign the authorisation.
- Attach the appropriately certified proof of identity documents.
- Review the checklist below.
- Send the request form to:

National Preservation Trust
PO Box 6003
Wollongong NSW 2500

IMPORTANT INFORMATION

This transfer may close your account with your previous fund. You will need to check this with your previous fund.

This form can **NOT** be used to:

- transfer part of the balance of your superannuation benefits from your previous funds
- transfer benefits if you do not know where your superannuation benefit is
- transfer benefits from multiple funds on this one form - a separate form must be completed for each fund you wish to transfer superannuation from
- change the fund to which your employer pays contributions on your behalf
- open a superannuation account, or
- transfer benefits under certain conditions or circumstances, for example if there is a superannuation agreement under the Family Law Act 1975 in place.

CHECKLIST

- Have you read the important information?
- Have you considered where your future employer contributions will be paid?
- Have you completed all of the fields on the form?
- Have you signed and dated the form?
- Have you attached the certified documentation including any linking documents if applicable?

WHAT HAPPENS TO MY FUTURE EMPLOYER CONTRIBUTIONS?

Using this form to transfer your benefits to NPT will not change the fund to which your employer pays your contributions and may close your account with the fund you are transferring your benefits from.

If you wish to change the fund into which your contributions are being paid, you will need to speak to your employer about Choice. NPT does not accept employer contributions.

For the appropriate forms and information about whether you are eligible to choose the fund to which your employer contributions are made, visit www.superchoice.gov.au or call the Tax Office of **13 10 20**.

THINGS YOU NEED TO CONSIDER WHEN TRANSFERRING YOUR SUPERANNUATION

When you transfer your superannuation, your entitlements under that fund may cease. You need to consider all relevant information before you make a decision to transfer your superannuation. If you ask for information, your superannuation fund must give it to you. Some of the points you may consider are:

- **Fees** - your previous superannuation fund must give you information about any administration, exit or withdrawal fees. If you are not aware of the fees that may apply, you should contact your fund for further information before completing this form. NPT does not charge a fee for rolling benefits into the fund.
- **Death and disability benefits** - your previous superannuation fund may insure you against death, illness or an accident which leave you unable to return to work. If you choose to leave that fund you may lose any insurance entitlements you may have. NPT does not offer insurance for death and disability.

If you require additional information about superannuation you may wish to visit the Australian Securities and Investment Commission website www.fido.asic.gov.au

WHAT HAPPENS IF I DO NOT QUOTE MY TAX FILE NUMBER (TFN)?

You are not obligated to provide your TFN to your superannuation fund. However, if you do not provide your TFN, you will be taxed at the highest marginal rate plus the Medicare levy, compared to the concessional tax rate of 15%.

Choosing to quote your TFN will also make it easier to keep track of your superannuation in the future.

Under the Superannuation Industry (Supervision) Act 1993, your superannuation fund is authorised to collect your TFN, which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change. The TFN may be disclosed to another superannuation provider, when your benefits are being transferred, unless you request in writing that your TFN is not to be disclosed to any other trustee.

COMPLETING PROOF OF IDENTITY

You will need to provide documentation with this transfer request to prove you are the person to whom the superannuation entitlements belong.

Acceptable documents

The following documents may be used.

EITHER

One of the following documents only:

- Driver's licence issued under State or Territory law
- Passport

OR

One of the following documents	AND	One of the following documents
<ul style="list-style-type: none"> ● Birth certificate or birth extract ● Citizenship certificate issued by the Commonwealth ● Pension card issued by Centrelink that entitles the person to financial benefits 		<ul style="list-style-type: none"> ● Letter from Centrelink regarding a Government assistance payment ● Notice issued by Commonwealth, State or Territory within the past twelve months that contains your name and residential address. For example: <ul style="list-style-type: none"> - Tax Office Notice of Assessment - Rates notice form local council

Have you changed your name or are you signing on behalf of another person?

If you have changed your name or are completing the form on behalf of the applicant, you will need to provide a linking document. A linking document is a document that proves a relationship exists between two (or more) names.

Suitable linking documents:

Change of Name Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office.

Signed on behalf of the Applicant Guardianship papers or Power of Attorney



Certification of Personal Documents

All copied pages of original proof of identification documents must be certified. A certified copy of a document is a photocopy of the original document which has been signed by a Justice of the Peace or another person who can endorse or certify documents, verifying that they have sighted the original document. Faxed copies will not be accepted.

For members outside of Australia, a document can be certified by a Justice of the Peace or a person of equivalent status in your country (e.g. a Notary) verifying that they have sighted the original document.

The following persons are eligible to certify copies of original documents:

- A permanent employee of Australia Post with five or more years of continuous service
- A finance company officer with five or more years of continuous service (with one or more finance companies)
- An officer with, or authorised representative of, a holder of an Australian Financial Services License (AFSL) having five or more years of continuous service with one or more licensees
- A notary public officer
- A police officer
- A registrar or deputy registrar of a court
- A Justice of the Peace
- A person enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia, as a legal practitioner
- An Australian consular officer or an Australian diplomatic officer
- A judge of the court
- A magistrate, or
- A Chief Executive Officer of a Commonwealth Court.