



Perpetual WealthFocus Super and Pension Plan

Perpetual Superannuation Limited ABN 84 008 416 831 AFSL 225246 RSE L0003315
Perpetual WealthFocus Superannuation Fund ABN 41 772 007 500 RSE R1057010

TRANSFER AUTHORITY BETWEEN FUNDS - SUPERANNUATION

1. Applicant details

You must complete a separate Transfer authority for each fund you are transferring from. Please photocopy as many forms as you need and send to each fund you are rolling your money from.

title	Mr	<input type="checkbox"/>	Mrs	<input type="checkbox"/>	Miss	<input type="checkbox"/>	Ms	<input type="checkbox"/>	Other	<input type="checkbox"/>	date of birth	<input type="checkbox"/>	<input type="checkbox"/>	/	<input type="checkbox"/>	<input type="checkbox"/>	/	<input type="checkbox"/>	<input type="checkbox"/>	
first name(s)	<input type="text"/>																			
last name	<input type="text"/>																			
tax file number ¹	<input type="text"/>																			
1 Under the superannuation industry (Supervision) Act 1993, you are not obliged to disclose your tax file number, but there may be tax consequences if you do not provide it.																				
gender	<input type="checkbox"/>	male	<input type="checkbox"/>	female																
phone (after hours)	<input type="text"/>									phone (business hours)	<input type="text"/>									
postal address	<input type="text"/>																			
suburb	<input type="text"/>									state	<input type="text"/>		postcode	<input type="text"/>						
If the address held by your 'FROM' fund is different to your current address, please give details below.																				
previous address	<input type="text"/>																			
suburb	<input type="text"/>									state	<input type="text"/>		postcode	<input type="text"/>						
email address	<input type="text"/>																			

2. Fund details

FROM	TO
fund name	Perpetual WealthFocus Superannuation Fund
fund address	fund phone number 1 8 0 0 0 2 2 0 3 3
fund phone number	client number (if known)
membership or account number	account number (if known)
Australian business number (ABN)	Australian business number (ABN) 4 1 7 7 2 0 0 7 5 0 0
Unique superannuation identifier	Unique superannuation identifier P E R 0 0 6 8 A U
	P E R 0 4 0 3 A U

If you have multiple account numbers with this fund, you must complete a separate form for each account you wish to transfer.

I authorise the transfer of the total value or partial value \$ of my benefit in the above superannuation fund or policy to: Perpetual Superannuation Limited, Perpetual WealthFocus Super Plan and Pension Plan, GPO Box 4171, Sydney NSW 2001.

Send the Rollover Benefit Statement directly to Perpetual.



Perpetual WealthFocus Super and Pension Plan

Perpetual Superannuation Limited ABN 84 008 416 831 AFSL 225246 RSE L0003315
Perpetual WealthFocus Superannuation Fund ABN 41 772 007 500 RSE R1057010

TRANSFER AUTHORITY TO YOUR SELF MANAGED SUPER FUND

1. Applicant details

You must complete a separate Transfer authority for each fund you are transferring from. Please photocopy as many forms as you need and send to each fund you are rolling your money from. We will follow up outstanding rollovers with the rollover institution on two occasions within the first 60 days of receiving your application.

Note: if you intend to claim a tax deduction for personal superannuation contributions made during the relevant financial year you must provide us with notice of your intention to claim a deduction before you lodge a transfer authority to your self managed super fund.

title	Mr	Mrs	Miss	Ms	other		date of birth	/	/					
first name(s)														
last name														
other/previous names														
tax file number ¹														
email address														
<small>1 Under the superannuation industry (Supervision) Act 1993, you are not obliged to disclose your tax file number, but there may be tax consequences if you do not provide it.</small>														
gender	male	female												
phone (after hours)						phone (business hours)								
residential address														
suburb						state			postcode					
If the address held by your 'FROM' fund is different to your current address, please give details below.														
previous address														
suburb						state			postcode					

2. Fund details

FROM

fund name	Perpetual WealthFocus Superannuation Fund													
client number (if known)														
account number (if known)														
Australian business number (ABN)	4	1	7	7	2	0	0	7	5	0	0			
Unique superannuation identifier	P	E	R	0	0	6	8	A	U					
	P	E	R	0	4	0	3	A	U					
Superannuation product identification number (SPIN)														

TO

SMSF name													
fund phone number													
Australian business number (ABN)													

If you have multiple account numbers with this fund, you must complete a separate form for each account you wish to transfer.

I authorise the transfer of the total value or partial value \$ of my benefit in the above superannuation fund or policy to the SMSF named above.

3. Proof of identity

If you do not provide proof of identity with this form your 'FROM' fund may not release your benefit and delay transferring it to us until you do.

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

or

I have attached **certified** copies of my:

Birth/Citizenship Certificate or Centrelink Pension Card

AND

Centrelink payment letter or Government or local council notice (less than one year old) with name and address

Certification of personal documents

All copied pages of ORIGINAL proof of identification documents (including any linking documents) need to be certified as true copies by an individual approved to do so (see below).

The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (eg Justice of the Peace, Australia Post employee, etc) and date.

The following people are authorised to certify 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 Licence (AFSL), having five or more years 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 a court
- a magistrate, or
- a Chief Executive Officer of a Commonwealth court.

4. Authorisation

By signing this request form I:

- declare I have fully read this form and the information completed is true and correct
- am aware I may ask my superannuation provider for information about 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
- consent to my tax file number being disclosed for the purposes of consolidating my account
- confirm that I am a member, trustee or director of a corporate trustee of the SMSF
- 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 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.

first name(s)	
last name	
signature	date / /



Perpetual WealthFocus Super and Pension Plan

Perpetual Superannuation Limited ABN 84 008 416 831 AFSL 225246 RSE L0003315
Perpetual WealthFocus Superannuation Fund ABN 41 772 007 500 RSE R1057010

COMPLIANCE LETTER

This letter can be provided to the fund you are rolling over from in order to confirm that Perpetual WealthFocus Super Plan/Wholesale Super Plan and Perpetual WealthFocus Pension/Wholesale Pension Plan is part of a complying fund.

Perpetual
Superannuation Limited

ABN 84 008 416 831
AFSL 225246
RSE L0003315

Level 18, Angel Place
123 Pitt Street
GPO Box 4171
Sydney NSW 2001
Australia
DX 365 Sydney

Client Services
Telephone 1800 022 033

To Whom It May Concern,

**Perpetual WealthFocus Superannuation Fund
(Perpetual WealthFocus Super Plan and Pension Plan)**

RSE Registration No. R1057010

Australian Business Number (ABN): 41 772 007 500

Superannuation Product Identification Number (SPIN): PER0068AU (Super Plan)

Superannuation Product Identification Number (SPIN): PER0403AU (Account Based Pension)

Perpetual WealthFocus Superannuation Fund (the Fund) is a complying superannuation fund constituted under a trust deed dated 26 May 1995 (as amended) (Trust Deed). The Trustee of the Fund is Perpetual Superannuation Limited.

The Trust Deed complies with the preservation and portability standards currently imposed on complying superannuation funds under the Superannuation Industry (Supervision) Act 1993 (Cth) and Regulations.

Yours faithfully

Directors, Perpetual Superannuation Limited