



Use this form to move the whole balance of your other super into your Essential Super account.

Things to consider before you consolidate

Before you make a decision to consolidate your super, you should:

- Compare the costs, fees, risks and benefits of your other super funds against Essential Super.
- You should also consider potential costs for withdrawing from other super funds, as well as any investment or tax implications.
- If you want to claim a tax deduction for personal super contributions, you must lodge a notice of intent to claim a tax deduction with your original fund, before you consolidate your super into another fund.

Information about insurance

If the account has insurance cover attached, before you make a decision to consolidate to your Essential Super account consider the following:

- You may lose your insurance cover, including cover for any existing illness, injury or condition by proceeding with the transfer of these super funds to Essential Super.
- Any insurance that may be provided with your Essential Super account will not be exactly the same as the cover you have with other super accounts. For example, there will be instances where you may not be covered for pre-existing conditions with insurance in Essential Super.
- You may be able to apply to transfer your insurance cover as Tailored cover into your Essential Super account. Please refer to the **Insurance Reference Guide** at commbank.com.au/essentialinfo for more information.
- We recommend that you speak with your other fund or a financial adviser about how your insurance cover will be affected if you close your account.

Any advice is general advice only. It does not take your personal objectives, financial or taxation situation or other needs into account. Before acting, you should consider the appropriateness of the advice, having regard to your objectives, financial situation and needs and obtain and consider the Product Disclosure Statement and Reference Guides. If you need advice on your personal circumstances, please talk to a financial adviser.



* These fields are mandatory

This form can be returned to us by post to: Reply paid 86495, Sydney, NSW 2001, or Upload a scanned copy on NetBank.



Some super funds may ask you for additional information such as a copy of your drivers license or passport before transferring your super to us. If you need help with this, or anything else, please call us on 13 4074.

Section 1 – Your personal details

*Name

Other/previous names

*Gender

*Date of birth

☐ F ☐ M

DD/MM/YYYY

Tax File Number

If you have not provided your TFN for your Essential Super account, you can do so by logging onto NetBank, or calling us on 13 4074. You are not obliged to disclose your TFN, but there may be tax consequences if you don't. If you do not want us to disclose your TFN to your other super fund you can let us know in writing. By doing this however, it may delay this transfer.

Section 2 – Residential details

*Current residential address

State

Postcode



Section 3A – Your other fund's details

These are the funds you are moving out of. You can use this form to transfer up to five super funds to your Essential Super account. If you have more than five super funds to transfer, please complete a separate form.

*Fund name

*Account/member number

*Unique Superannuation Identifier (USI)

☐ Full rollover OR ☐ Partial rollover \$

*Fund name

*Account/member number

*Unique Superannuation Identifier (USI)

*Fund name

*Account/member number

*Unique Superannuation Identifier (USI)

*Fund name

*Account/member number

*Unique Superannuation Identifier (USI)

*Fund name

*Account/member number

*Unique Superannuation Identifier (USI)

Section 3B – Your SMSF details

*Your SMSF name

*Australian Business Number (ABN)

Electronic Service Address (ESA) alias

Section 4 – Your Essential Super fund's details

*Fund name

*Account number

Unique Superannuation Identifier (USI)

Australian Business Number (ABN)

Section 5 – Authorisation

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

- I declare I have read this form and the information completed is true and correct.
- I am aware I may ask my superannuation provider listed in section 3 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 have obtained or do not require any further information.
- I consent to my Tax File Number being disclosed for the purposes of consolidating my account.
- I discharge the superannuation provider of my FROM fund of all further liability in respect of the benefits paid and transferred to my Essential Super fund.
- I request and consent to the transfer of superannuation from the fund listed in section 3 and authorise the superannuation provider of each fund to give effect to this transfer to my Essential Super fund detailed in section 4.
- Where my other fund is an SMSF, I confirm that I am a member.

*Name

*Signature required

*Date signed

A note to super funds: This form complies with Regulation 6.33 of the Superannuation Industry (Supervision) Regulations 1994 and captures all mandatory information as outlined in the form in Schedule 2A.

Bank Use only

This form should not be accepted or processed at branch.

Please mail to: Essential Super, Reply Paid 86495, Sydney NSW 2001 or contact 13 4074

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This information is issued by CFS and may include general financial product advice but does not consider your individual objectives, financial situation, needs or tax circumstances, and so you should consider the appropriateness of the advice having regard to your circumstances before acting on it. The Target Market Determination (TMD) for Essential Super can be found at cfs.com.au/tmd and includes a description of who the financial product is appropriate for and any conditions on how the product can be distributed to customers. You should read the Product Disclosure Statement (PDS) and the Reference Guides for Essential Super carefully and consider whether the information is appropriate for you before making any decision regarding this product. Download the PDS and Reference Guides at commbank.com.au/essentialsuper-documents or call us on 13 4074 for a copy. None of the Bank, HoldCo, CFS, nor any of their respective subsidiaries guarantee the performance of Essential Super or the repayment of capital by Essential Super. An investment in this product is subject to risk, loss of income and capital invested. An investment in Essential Super is via a superannuation trust and is therefore not an investment in, deposit with or other liability of the Bank or its subsidiaries.

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