

Transfer Authority - Individual

Connelly Temple Employer Super Plan



Asteron Portfolio Services Limited ABN 61 063 427 958 AFS Licence No 237905
Level 23 2 Market Street Sydney NSW 2000
Telephone 1300 361 755

This form should be completed to transfer monies into the Connelly Temple Employer Super Plan
Please note: Some funds may contact you requiring further information.

1. Personal details (please provide your current details)

Member number	<input type="text"/>	Title	<input type="checkbox"/>	Mr	<input type="checkbox"/>	Mrs	<input type="checkbox"/>	Miss	<input type="checkbox"/>	Ms	<input type="checkbox"/>	Other	<input type="text"/>
Surname	<input type="text"/>	Preferred name	<input type="text"/>										
Given name(s)	<input type="text"/>	Date of birth	<input type="text"/> / <input type="text"/> / <input type="text"/>										
Street number	<input type="text"/>	Street name	<input type="text"/>										
Suburb	<input type="text"/>	State	<input type="text"/>	Postcode	<input type="text"/>	Country	<input type="text"/>						
Termination date with previous employer	<input type="text"/> / <input type="text"/> / <input type="text"/>		Current employers name	<input type="text"/>									

2. Paying institution details (please provide other funds' details)

Name of institution	<input type="text"/>										
Address of institution	<input type="text"/>										
Suburb	<input type="text"/>	State	<input type="text"/>	Postcode	<input type="text"/>						
Name of fund	<input type="text"/>										
Membership/policy number	<input type="text"/>										

- I hereby authorise the transfer of (please indicate) full account balance, or partial account balance \$

from the named account, fund or policy to Connelly Temple Employer Super Plan which forms part of the Connelly Temple Public Superannuation Fund.

- I understand that the Connelly Temple Public Superannuation Fund is a complying fund under the Superannuation Industry (Supervision) Act 1993;
- I advise that the Trustee, Asteron Portfolio Services Limited is acting on my behalf in this matter, and hereby give you authority to provide all relevant information and to forward the cheque for the transfer to Asteron Portfolio Services Limited;
- I understand that in certain cases, the Trustee may be required by law to deduct tax from the untaxed portion, if any, of the Eligible Termination Payment (ETP);
- I understand that the Trustee of the paying institution is discharged from any further liability in respect of any amount once benefits have been transferred;
- I approve the deduction of transfer fees (if any) from the benefits transferred (subject to legislative restrictions).

Member's signature Date / /

continued over page

3. Certificate of compliance

The Trustee of the Connelly Temple Public Superannuation Fund (Fund), of which the Connelly Temple Employer Super Plan is a part, certifies that:

- (a) The Trust Deed governing the Fund complies with requirements of the Superannuation Industry (Supervision) Act and Regulations;
- (b) The Trust Deed allows benefits to be transferred to the Fund;
- (c) Members cannot borrow monies from the Fund;
- (d) Members can only receive any benefits from the Fund on their retirement after preservation age, age 65 or earlier in the case of invalidity, or as approved individually by the Trustee or the Australian Prudential Regulation Authority, or where the benefit transferred to the Fund is not subject to compulsory preservation requirements;
- (e) The Trustee of the Fund is Asteron Portfolio Services Limited;
- (f) The Superannuation Fund Number (SFN) for the Fund is 0134442946;
- (g) The ABN of the Fund is 78 378 563 002;
- (h) The Superannuation Product Identification Number (SPIN) for the Superannuation Plan is RSA0102AU;
- (i) Cheques are to be made payable to Asteron Portfolio Services Limited;
- (j) Cheques and form(s) are to be sent to:
Connelly Temple Employer Super Plan
GPO Box 1576 Sydney NSW 2001

Should you have any further enquiries, please call Asteron Client Services on 1300 361 755.