

Please read before completing

Please complete this form if you wish to roll over your Superannuation from another fund (OLD Fund) to your Capital Guaranteed Super/Pension (NEW Fund) account. Australian Military Bank will let you know when the rollover has been completed.

- Use blue or black pen only.
- Please use BLOCK letters.
- Please place an X in boxes where required.

Where to send our completed forms:

Australian Military Bank

Email: retire@australianmilitarybank.com.au

Post: PO Box H151 Australia Square NSW 1215

1. MEMBER DETAILS

Superannuation Member Number

Title

Given name(s)

Surname or family name

Date of Birth

Email address

Contact number

Residential address

Suburb/Town

State

Postcode

Email address

2. ROLLOVER DETAILS**ROLLOVER 1**

Full balance OR Partial amount of

FUND DETAILS:

Fund's name

Fund's address

Suburb/Town

State

Postcode

USI

Fund's phone number

ABN

SFN of fund

Member or account no.

NEW FUND DETAILS:

Australian Military Bank Capital
Guaranteed Super/Pension

PO Box H151

Australia Square, NSW 1215

Phone: 1300 13 23 28

ABN: 48 087 649 741

USI: 48 087 649 741 001

SPIN: Not applicable

2. ROLLOVER DETAILS (CONTINUED)

ROLLOVER 2

Full balance OR Partial amount of \$

FUND DETAILS:

Fund's name

Fund's address

Suburb/Town

State

Postcode

USI

Fund's phone number

ABN of fund

SFN of fund

Member or account no.

NEW FUND DETAILS:

Australian Military Bank Capital
Guaranteed Super/Pension

PO Box H151

Australia Square, NSW 1215

Phone: 1300 13 23 28

ABN: 48 087 649 741

USI: 48 087 649 741 001

SPIN: Not applicable

3. INVESTMENT DETAILS

Please indicate how you would like your investment to be allocated.

	Option 1 Percentage (%)	Option 2 Dollar Amount (\$)
Variable Interest rate*		
Fixed term Interest rate#		
Total (must be equal to 100%)		

*A minimum of \$180 is required to be held in variable interest option

#The actual interest rate applied to the fixed term will be the interest rate current at the time of investment and not the date we received your request

#Capital Guaranteed Pension account are allowed to invest a maximum of 80% of the account balance in fixed term option

Select your term (fixed term only): 12 months 24 months 36 months

4. PRIVACY STATEMENT

Please read this Privacy Statement to see how Australian Military Bank uses your personal information:

Australian Military Bank (ABN 48 087 649 741) of (PO Box H151 Australia Square NSW 1215), collects your personal information (PI) to run your super account (including insurance), improve our products and services and keep you informed. If we can't collect your PI we may not be able to do these tasks. PI is collected from you and sometimes from third parties. We will only share your PI where necessary to perform our activities with our, service providers, as required by law or court/tribunal order, or with your permission. Your PI may be accessed overseas by some of our service providers. Our Privacy Policy details how to access and change your PI, as well as the privacy complaints process. For complete details on the above go to www.australianmilitarybank.com.au or call us on 1300 132 328.

5. AUTHORISATION

- I declare I have fully read this form and the information completed is true and correct
- I am aware that I may ask my old fund(s) for information about any fees or charges that may apply, or any other information about the effect this rollover may have on my benefits, and do not require any further information
- I discharge my old fund(s) of all further liability in respect of the benefits paid and rolled over to Australian Military Bank
- I request and consent to the rollover of superannuation as described above and authorise the superannuation provider of each fund to give effect to this rollover
- I authorise all relevant information on my investments, superannuation, account based pension and any other financial information be released at their request, to representatives of Australian Military Bank Ltd

By signing this request form I'm making the following statements:

- I declare I've fully read this form and the information completed is true
- I'm aware I may ask my super 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 such as insurance cover, and do not require any further information
- I authorise Australian Military Bank (or its agents) to contact my other super fund regarding this request to combine my super from that fund into my Australian Military account only
- I'm aware that once my completed form is received by Australian Military Bank, it will usually be processed within three business days
- I've read the Privacy Collection Statement and I understand how Australian Military Bank will use my personal information

Full Name: _____

Signature

Date

IMPORTANT NOTES REGARDING YOUR ROLLOVER REQUEST

Things you need to consider

When you rollover your superannuation from one fund (old fund) to another fund (new fund), your entitlements under the old fund may cease. You need to consider all relevant information before you make a decision to roll over your superannuation. If you ask for information, your superannuation provider must give it to you. Some of the things you may consider are:

- Fees – your old fund(s) must give you information about any exit or withdrawal fees. If you are not aware of the fees that may apply, you should contact your old fund(s) for further information before completing this form. Our Capital Guaranteed Super/Pension does not charge any entry fees on your rollover.
- Death and disability benefits – Your old fund(s) may insure you against death, illness or an accident which leaves you unable to work. If you choose to leave your old fund(s), you may lose any insurance entitlements you have.

Future employer contributions

Using this form to rollover your superannuation will not change the fund to which your employer pays your contributions and may close the account you are transferring your superannuation 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 or download the Superannuation Contribution form from our website at australianmilitarybank.com.au/retirement.