

Virgin Super Rollover Form



A few tips for you.

- Use blue or black pen
- Print within the boxes in clear BLOCK LETTERS and use not
- Faxed copies are not valid
- If you have multiple super funds, you'll need to complete a separate form for each fund,
 - contact Virgin Super for additional forms
 - photocopy this form
 - download it from virginmoney.com.au

STEP 1 VITAL STATISTICS

Title	<input type="text"/>	Given name(s)	<input type="text"/>	Family name	<input type="text"/>
Address	Street No.	<input type="text"/>			
	Suburb				
		State	<input type="text"/>		
Date of Birth	<input type="text"/>	Gender	<input type="text"/>	Virgin Super Member Number	<input type="text"/>

STEP 2 YOUR OLD FUND DETAILS

Name of old fund	<input type="text"/>	Membership Number	<input type="text"/>
Name of old super account (if known)	<input type="text"/>	Value	<input type="text"/>
Address of old fund (if known)	<input type="text"/>		
	Suburb	State	Postcode
Phone number of old fund (if known)	<input type="text"/>		
		of rollover (approx) \$	Rollover entire fund (tick) <input type="checkbox"/>

Instruction to the other fund trustee

I authorise the transfer of all my benefits as noted above, to Virgin Super with all the relevant details, including details of my membership, and any other information that may be required to effect this transfer.

I am aware that as a member of the fund, I may ask you for information about my benefit entitlements in the fund, but I do not require such information.

STEP 3 AUTHORISATION

1. I authorise the transfer of all my benefits as outlined above.
2. In doing so, I understand that:
 - I may be asked for more info later on, such as proof of ID
 - the funds rolled into my account will be invested in line with my existing Virgin Super investment strategy
 - I understand that by rolling to Virgin Super I may incur fees or lose benefits (for example, insurance) that I currently hold with my old fund;
 - the trustee of my old fund is discharged from liability once the money has been rolled over;
 - I approve the deduction of transfer fees (if any) from the amount transferred (subject to law) and;
 - in certain cases, the Trustee may be required (under law) to deduct tax from the untaxed portion (if any) of the amount transferred;
 - any info Virgin Super provides me is of general nature only. If I'm unsure about anything, I'll chat with a financial advisor.

Your signature	<input type="text"/>	Date	<input type="text"/>
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Please sign the form and post it to Virgin Super. We'll let you know when we receive the money from your old fund (this should take about a month).



Customer Care Team
Virgin Super, Reply Paid 83154
Haymarket, NSW 1236



1300 652 770
8am – 8pm (EST)
Monday – Friday
if you need any help.

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SPIN: TCS005AU,