


Rollover into the Mercer Super Trust

Roll other super money into the Mercer Super Trust

If you have super money with more than one super provider, you'll need to complete a separate Rollover form for each amount. Once your previous super money has been received and credited to your Mercer Super account, you'll receive confirmation from us.

If you need help

For assistance or to access the Privacy Policy and your personal information call the Helpline on **1800 682 525**.



This form can be completed digitally or by hand with a black or blue pen in uppercase with one character per box. **Please note** the form must be signed with a pen and submitted by post. The form cannot be signed digitally.

Want to make this quicker and easier?

Did you know you can also do this in your Member Online account? It's faster, easier and more secure for you www.mercersuper.com.au
Having trouble? Here's some troubleshooting information to help get you logged in www.mercersuper.com.au/member-online-and-mercero-super-app

Step 1: Complete your personal details

Title: Mr <input type="radio"/> Mrs <input type="radio"/> Ms <input type="radio"/> Miss <input type="radio"/> Other <input type="text"/>		Date of birth <input type="text"/>	
Given names <input type="text"/>			
Surname <input type="text"/>			
Residential address <input type="text"/>			
Suburb <input type="text"/>		State <input type="text"/>	Postcode <input type="text"/>
Postal address (if different to above) <input type="text"/>			
Suburb <input type="text"/>		State <input type="text"/>	Postcode <input type="text"/>
Telephone number <input type="text"/>		Mobile number <input type="text"/>	
E-mail <input type="text"/>			
Account/Membership number <input type="text"/>			
Plan/Product name <input type="text"/>			
Name of employer <input type="text"/>			

Step 2: Provide details of your previous super fund

Name of previous fund or policy

Previous fund's Unique Superannuation Identifier (USI)/Electronic Service Address (ESA)*

Telephone number

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Licensee name

Membership or policy number

* All payments to/from a Self Managed Super Fund (SMSF) must use SuperStream to roll over your super benefits. This means for a SMSF rollover you will need to supply the Electronic Service Address (ESA).

Step 3: Rollover Type and Amount

This will be a:

Full Rollover Partial Rollover

The rollover will be:

\$, , -

OR Approximate value

\$, , -

Your Privacy

We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. Our Privacy Policy outlines the type of information we keep about you and how we, and any organisations we appoint to provide services on our behalf, will use this information. If you do not provide the personal information requested, we may not be able to manage your superannuation. You can read our Privacy Policy online at mercer.com.au/privacy or you can obtain a copy by calling the Helpline.

The policy also includes details about how you may lodge a complaint about the way we have dealt with your information and how we will handle that complaint.

Step 4: Instructions to previous super provider & sign the form

I request that you transfer the total value held in respect of me for the above super fund or policy to the Mercer Super Trust:

- I understand that on payment by my previous super fund, I discharge that super fund from any further liability in respect of the amount transferred.
- I request that any further contributions received by my previous super fund after my payment, be redirected to my membership with the Mercer Super Trust.
- I understand that information contained in this form will be handled by the trustee of the Mercer Super Trust to process my rollover.
- I understand and consent to my information being collected, disclosed and used in the manner set out in this form.
- I understand that I will receive confirmation once my money has been received in the Mercer Super Trust.
- I understand that I have the right to ask my previous super fund for information that I reasonably require for the purpose of understanding any super entitlements I may have in that fund, including information about any fees and charges that may apply to the transfer and information about the effect of the transfer on any entitlements I have in my previous super fund. I confirm that I do not require such information from my previous fund.

Signature

Date

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Make sure you sign and date your completed form and send it to: Mercer Super Trust, GPO Box 4303 Melbourne 3001.