

Westpac Group Plan Transfer your super in form (Defined Benefit Members)

Complete this form if you want to transfer your super from another fund into your Westpac Group Plan.

1. Other fund details

See the last benefit statement you received from your other fund for these details:

Full name of other fund

Address of other fund

State

Postcode

Your membership/policy number in other fund

Date of birth (dd/mm/yyyy)

Employee number

2. Personal details

Full name of other fund

Given name(s)

Home address (required)

State

Postcode

Postal address (if different)

State

Postcode

Daytime phone (required)

Mobile phone number

Date of birth (dd/mm/yyyy)

Employee number

3. Transfer authorisation

- I request and authorise the transfer of my benefit from the fund detailed in Section 1 to my account in Westpac Group Plan. Details for the Plan are over the page.
- I also authorise the transfer of any contribution received by my other fund after the benefit has been paid to be transferred to my account in Westpac Group Plan.
- I understand this authorisation to transfer my benefit(s):
 - means that any insurance cover I have in the other fund may cease on transfer of my benefit from that fund
 - discharges the trustee of the other fund from any further liability in respect of the benefit transferred
 - may mean a transfer fee or exit fee is deducted from the benefit to be transferred and I approve the deduction subject to legislative restrictions
 - means that Westpac Group Plan may be required by law to deduct tax from the untaxed portion, if any, of the benefit.
- I have had the opportunity to obtain relevant information from the trustee of my other fund about transferring my benefit from that fund.

Signature

X

Date

/ /

4. Notes for members

DO NOT complete this form if:

- you have insurance cover with the other fund that you want to maintain and it will cease if you transfer your super
- you only want to transfer part of your super in another fund into Westpac Group Plan (contact the other fund for separate instructions)
- you expect further contributions to be made to your other fund
- you have advised the Australian Taxation Office to pay a Superannuation Guarantee amount to your other fund.

When your super is transferred to Westpac Group Plan:

- the amount will be credited to your Westpac Group Plan – Defined Benefit SuperSave account
- the amount will be invested in your current investment option. The value of your super after it is transferred will depend on the investment performance of the investment option(s) you have chosen.

Please read the Member information booklet for information on how your Westpac Group Plan – Defined Benefit works.

And if you need any help deciding on whether to transfer your super, you should speak to a licensed financial adviser before you complete this form.

5. Note to other fund administrator

Compliance

The Westpac Group Plan (ABN 19 905 422 98, USI 19905422981364) is a regulated superannuation fund administered in accordance with the Superannuation Industry (Supervision) Act 1993 and is a complying superannuation fund for tax purposes.

Information required

All cheques should be made payable to 'Westpac Group Plan – Defined Benefit'.

Please send cheques with a copy of this form and the relevant member information to:

Westpac Group Plan – Defined Benefit
Locked Bag A4055
Sydney South NSW 1235

6. Need more information?

For enquires or more information, you can:

- email us via mercersuper.com.au/westpacgroupplan
- write to Westpac Group Plan – Defined Benefit, Locked Bag A4055, Sydney South NSW 1235
- call the Westpac Group Plan – Defined Benefit Helpline on 1800 227 262.

7. Privacy

The information provided in this form will be used to effect the transfer of your super benefit. To read our privacy statement, visit mercersuper.com.au/privacy. For information about your other fund's privacy policy, please contact your other fund.

8. Return this form

Please send this form direct to your other fund. Or, if you've completed the address in Section 1, you can send the form to us at Westpac Group Plan – Defined Benefit, Locked Bag A4055, Sydney South NSW 1235 and we'll forward it to your other fund.

Once the other fund receives this form, they have 30 days to transfer your super to us if they've got all the information they need. But for privacy reasons, we can't ring your other fund about your super. So if we haven't received your money yet and you'd like to know where your transfer is up to, we'll ask you to ring them directly.