

# Private Super Fund Closure form

Please complete this form if you wish to close your Fund or appoint new Trustees for your Fund.  
We recommend that you first consult with your Adviser before completing this Form.

Fund name

Fund number

Member account number

Title

Surname

Given name(s)

## Section 1: Residency details

Please advise (✓) if you are an Australian resident:

Yes, I am an Australian resident

No, I am not an Australian resident, my country of residence is:

## Section 2: Type of closure

Please select the type of closure you wish to make:

I wish to close my Fund and have the assets paid to me as cash, please complete Section 2A

I wish to close my Fund rollover the benefits to another superannuation fund, please complete Section 2B

I wish to transfer the trusteeship of my fund, please complete Section 2C.

### 2A Financial institution details

Please note: that the closure of your Fund may be a capital gains tax event.

I would like to receive a cash payment and

I declare that I am over 65

I declare that I have terminated employment after reaching age 60.

I have reached my preservation age and permanently retired.

I wish to receive a cash payment for other reasons, please specify:

Account name

Name of financial institution where your account is held

Branch name

Branch (BSB) number

 - 

Account number

# Private Super Fund Closure form

## 2B Rollover transfer details

Please note: you are required to provide proof of identity and the rollover of your Fund is a capital gains tax event.

New fund name

Membership number

ABN

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SPIN

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New fund address

Suburb

State

Postcode

Proof of identity

I have attached a certified copy of:

my driver's licence or passport OR

my birth/citizen certificate or Centrelink pension card AND

my Centrelink payment letter or Government or local council notice  
(less than one year old) with name and address

## 2C Change in trusteeship details

Please note: the transfer of trusteeship of your Fund involves AET retiring as trustee and the appointment of new trustees as set out below. All assets of your Fund will be transferred into the name of the new trustee.

New trustee's name

ACN\*

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\* Required if you are transferring trusteeship of your Fund to a corporate trust.

Trustee address

Suburb

State

Postcode

# Private Super Fund Closure form

## Section 3: Asset Instructions

Where you wish to sell the assets of your Fund, please advise the following:

- I wish to sell all the assets of my Fund. Please note your Fund's listed assets are required to be sold by your financial adviser.
- I wish to sell the following assets of my Fund. Please note your Fund's listed assets are required to be sold by your financial adviser.


Where you wish to transfer the assets of your Fund, please advise the following:

- I wish to transfer all the assets of my Fund
- I wish to transfer the following assets from my Fund


For the above transferring listed assets, please advise of the transfer method:

- Issuer sponsored
- Broker sponsored, with:

Participant number	HIN
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>

Broker's full name

Broker's firm <input style="width: 100%;" type="text"/>	Broker's contact number <input style="width: 100%;" type="text"/>
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For the transferring listed assets above, please advise of the new registration details:

Transferee's name

Address

Suburb <input style="width: 100%;" type="text"/>	State <input style="width: 100%;" type="text"/>	Postcode <input style="width: 100%;" type="text"/>
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For the transferring unlisted assets above, please advise of the new registration details:

Transferee's name

Address

Suburb <input style="width: 100%;" type="text"/>	State <input style="width: 100%;" type="text"/>	Postcode <input style="width: 100%;" type="text"/>
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## Completing proof of identity

You will need to provide documentation with this closure request to prove you are the person to whom the superannuation entitlements belong.

### Acceptable documentation

Either one of the following documents may be used:

- driver's licence issued under State or Territory law

OR

- passport

Other acceptable forms of identification are either one of the following:

- birth certificate or birth extract
- citizenship certificate issued by the Commonwealth
- pension card issued by Centrelink that entitles the person to financial benefits

AND

- letter from Centrelink regarding a Government assistance payment
- notice issued by Commonwealth, State or Territory Government or local council within the past twelve months that contains your name and residential address For example Tax Office Notice of Assessment or Rates notice from local council

## Have you changed your name or are signing on behalf of another person?

If you have changed your name or are signing on behalf of the applicant, you will need to provide a certified linking document.

A linking document is a document that proves a relationship exists between two (or more) names.

The following table contains information about suitable linking documents.

Purpose	Suitable linking documents
Change of name	Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office.
Signed on behalf of the applicant	Guardianship papers or Power of Attorney.

## Certification of personal documents

All copied pages of ORIGINAL proof of identification documents (including any linking documents) need to be certified as true copies by any individual approved to do so.

The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (eg Justice of the Peace, Australia Post employee, etc) and date.

The following can certify copies of the originals as true and correct copies:

- a permanent employee of Australia Post with five or more years of continuous service
- a finance company officer with five or more years of continuous service (with one or more finance companies)
- an officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having five or more years continuous service with one or more licensees
- a notary public officer
- a police officer
- a registrar or deputy registrar of a court
- a Justice of the Peace
- a person enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia, as a legal practitioner
- an Australian consular officer or an Australian diplomatic officer
- a judge of a court
- a magistrate, or a Chief Executive Officer of a Commonwealth court.

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