



Perpetual's DIY Super

Perpetual Superannuation Limited ABN 84 008 416 831 AFSL 225246 RSE L0003315
Perpetual Trustee Company Limited ABN 42 000 001 007 AFSL 236643

This form can be used by members of the Self Managed Super Fund Service and members of the Small APRA Fund Service.

BENEFIT TRANSFER REQUEST

Please complete this form in black ink using BLOCK letters.

1. Member details

title	Mr	Mrs	Miss	Ms	other	
first name(s)						
last name						
date of birth				tax file number (TFN)		
Under the Superannuation Industry (Supervision) Act 1993, you are not obliged to disclose your TFN, but there may be tax consequences.						
Are you an Australian resident for tax purposes?	yes	no				
phone (after hours)				phone (business hours)		
mobile				fax		
email						
residential address						
suburb				state	postcode	
country						
previous address	If you know that the address held by your 'FROM' fund is different to your current residential address, please give details below.					
suburb				state	postcode	
country						

2. Fund details

FROM other provider		TO Perpetual	
fund name		fund name	
fund postal address		membership or account number (if known)	
fund phone number		fund Australian business number (ABN) (if known)	
membership or account number			
Australian business number (ABN)			
Unique Superannuation Identifier (USI) (if known)			
transfer amount	full	partial	nominated amount \$
special instructions			

3. Proof of identity

I have attached a certified copy of my driver's licence or passport

or

I have attached certified copies of both:

Birth/Citizenship Certificate or Centrelink Pension Card

AND

Centrelink payment letter or Government notice (less than 12 months old) or local council notice (less than 3 months old).

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 an individual approved to do so (see below).

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

4. Authorisation

By signing this request form I am making the following statements:

- I declare I have fully read this form and the information completed is true and correct
- I am aware I may ask my superannuation 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, and do not require any further information.
- I discharge the superannuation provider of my 'FROM' fund of all further liability in respect of the benefits paid and transferred to my 'Perpetual' fund.

I request and consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect to this transfer.

first name(s)				
last name				
signature		date		



This compliance letter is for use by members of the Small APRA Fund Service.

COMPLIANCE LETTER

To the Trustee

Perpetual Small APRA Fund Service

Perpetual Superannuation Limited wishes to confirm that the trust deed to be used for the Small APRA Funds utilising this Service:

- Complies with the Superannuation Industry (Supervision) Act 1993 and Regulations ('SIS').
- Provides for benefits to be transferred into the Fund.
- Complies with the preservation requirements set out in SIS.

The Fund accepts all contribution types, including superannuation guarantee contributions from any employer on behalf of a member.

As required the Fund will apply to the Australian Taxation Office for an Australian Business Number and/or to the Australian Prudential Regulation Authority for a Registrable Superannuation Entity number. Copies of the relevant application forms will be provided by us upon request.

Perpetual Superannuation Limited acts as trustee of the Fund.

Yours faithfully

**Directors,
Perpetual Superannuation Limited**

Note: The above wording has been approved by the Australian Taxation Office as an acceptable notification that a fund is a complying fund.

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This certificate is for use by trustees using the Self Managed Super Fund Service.

CERTIFICATE OF COMPLIANCE

To Whom it may concern

fund name	
ABN	(if available)

As Trustees for the above named Self Managed Superannuation Fund ('the Fund'), we confirm that the Fund is registered as a Complying Superannuation Fund and complies with:

- the provisions of the Superannuation Industry (Supervision) Act 1993 and Regulations ('SIS');
- provides for benefits to be transferred into the Fund; and
- the preservation requirements as set out in SIS.


We also confirm that the Trust Deed ('the Deed') establishing the Fund allows for acceptance of all contribution types including superannuation guarantee contributions from any employer on behalf of a member.

Further confirmation as to the Fund's compliance can be obtained from the Australian Government's Super Fund Lookup website, which can be accessed online via www.superfundlookup.gov.au or by calling 13 10 20. Please quote the Fund's Australian Business Number (ABN) (provided above) when initiating the search.

Yours faithfully

trustee signature	
full name	
trustee signature	
full name	
trustee signature	
full name	
trustee signature	
full name	
date	/ /

Company signatures

signature	<input type="text"/>	date	/	/	
full name					
capacity	sole director <input type="checkbox"/>	director	<input type="checkbox"/>		
signature	<input type="text"/>	date	/	/	
full name					
capacity	director <input type="checkbox"/>	company secretary	<input type="checkbox"/>		