

Superannuation benefit transfer request

Important information

Please note:

- Use this form to request another institution to transfer money from your super to a Lifestream Guaranteed Income annuity.
- Use black or blue pen and CAPITAL LETTERS.
- You should contact your other super fund(s) to find out if there are any fees, charges or other consequences for transferring your super out of that fund, such as losing any insurance cover.
- Legislation limits the amount of superannuation monies that can be used to invest in a Lifestream Guaranteed Income annuity. We recommend you speak to a financial adviser or Tax Adviser before making a decision to transfer your benefit(s). If you would like more information about your benefit, contact us on the **number shown above**.

1. Personal details

(All fields must be completed)

Title

Given name(s)

Surname

Date of birth

Gender

☐ Male ☐ Female

Residential address (PO Box is not acceptable)

Suburb

State

Postcode

Country

If you know that the address held by your **From** fund is different to your current residential address, please give details below.

Postal address

Suburb

State

Postcode

Country

1. Personal details (continued)

Mobile number

Alternate phone number

Email address

Tax file number¹

2. Fund details

! Please note: If you have more than two super accounts to transfer from you will need multiple copies of this form.

From:

Fund name

Fund address

Suburb

State

Postcode

Country

Membership or Account number

Australian business number (ABN)

Unique Superannuation Identifier (USI)

¹ You are not obliged to disclose your tax file number, but there may be tax consequences if you do not. For further information on this, please refer to your latest PDS.

2. Fund details (continued)

To:

Resolution Life Australasia Limited

ABN

84 079 300 379

Unique Superannuation Identifier (USI)

84 079 300 379 014

If relevant make cheques payable to **Resolution Life Australasia Limited**



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From:

Fund name

Fund address

Suburb

State

Postcode

Country

Membership or Account number

Australian business number (ABN)

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If relevant make cheques payable to:
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3. Declaration and acknowledgement

By signing this form I declare as follows:

- 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 fees or charges that may apply, or any other information about the effect this transfer may have on my benefits.
- I consent to my tax file number being disclosed for the purposes of commencing my account.
- I discharge the superannuation provider of my Australian super fund of all further liabilities in respect of the benefits paid and transferred to Resolution Life.
- 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.

Name (Print in CAPITAL LETTERS)

Member's signature

Date

4. Proof of identity

No identification is required for rollovers where your Tax File Number (TFN) is validated via the ATO SuperTICK service. If your TFN can't be validated, no identification will be required, so long as your name, date of birth and address details provided on your request corresponds with the other funds and our records. If there is a discrepancy in your name, date of birth or address, we, or the other fund, may request that you provide further proof of your identity.

Where to send this form

This form must be mailed to:

Resolution Life
GPO Box 3306
Sydney NSW 2001

Contact phone number

133 731

between 9 am and 5 pm (AEST/AEDT), Monday to Friday, excluding public holidays.

eProcess details (financial adviser use only)

Scan and email forms to
Au.NewBusinessAnnuity@resolutionlife.com.au

What you need to know

Resolution Life Australasia Limited ABN 84 079 300 379, AFSL No. 233671 (Resolution Life) is the issuer of Guaranteed Annuities Lifestream Guaranteed Income. The information contained in this document is factual information only and it does not contain any financial product advice or make any recommendations about a financial product or service being right for you. Any guarantee offered in this product is only provided by Resolution Life. Resolution Life can be contacted via resolutionlife.com.au/contact-us or by calling 133 731.