

Retirement Scheme

Transfer of Contributory Membership (From State Super or Local Government Super)

About this form

Please complete this form to transfer your super if you:

- were a contributing member of either the State Authorities Superannuation Scheme (SASS) or Local Government Super (LGS) Retirement Scheme; and
- have transferred employment to an EISS employer; and
- commenced employment with your EISS Super Scheduled Employer within three (3) months after the end of the month you terminated employment with your SASS or LGS employer; and
- have not attained your Early Retirement Age; and
- have not applied for payment (or rollover) of any part of your SASS or LGS benefits (including the Basic Benefit).

Please note, that while many of the provisions and benefits provided by SASS and LGS are comparable with the Retirement Scheme, you should read the Retirement Scheme Product Disclosure Statement (PDS) and the 'Mobility transfer from State Super or Local Government Super' fact sheet available at eisuper.com.au/factsheets or by calling us on 1300 369 901.

We're here to help

If you need assistance completing this form, you can call us on 1300 369 901, Monday to Friday from 8am to 8pm (AEST).

Please complete all sections of this form as applicable, sign and return the completed form to:
EISS Super GPO Box 7039, Sydney, NSW 2001.

Step 1. Your personal details

Member Number

Date of birth

Mr / Mrs / Ms / Miss / Other

Given name(s)

Surname

Residential address (must be advised)

Suburb

State

Postcode

Postal address (if different to the above)

Suburb

State

Postcode

Telephone

Mobile

Email

Step 2. Tax File Number (TFN)

Your Tax File Number (TFN)

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It is not compulsory to provide your TFN but if you don't there may be tax consequences. For further information refer to the 'TFN warning' section below.

TFN warning

Under the Superannuation Industry (Supervision) Act 1993, your super fund is authorised to collect your TFN, which will only be used for lawful purposes. These purposes may change in the future as a result of legislative change. If you transfer your super to another fund we may disclose your TFN to the other super provider unless you tell us not to in writing. It is not an offence not to quote your TFN. However, providing your TFN to your super fund will have the following advantages (which may not otherwise apply):

- your super fund will be able to accept all types of contributions to your account/s;
- the tax on employer contributions to your super account/s will not increase;
- other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your super benefits; and
- it will make it much easier to trace different super accounts in your name so that you receive all your super benefits when you retire.

I give permission for EISS Super to use my TFN and personal details to contact other super funds and the Australian Taxation Office (ATO) to find out if I have other superannuation monies, to receive the results of any ATO searches of the ATO's super records, to receive transfers or payments of any amount identified through the search process and otherwise assist in consolidating your super accounts (select an option ✓)

Yes No

Step 3. Employment details

Current employer name

Date joined employer / /

Previous employer name

Date employment ceased with employer / /

Scheme name (select an option ✓)

SASS LGS

Superannuation Number

Step 4. Investment strategy

As a contributing member of the Retirement Scheme, your Contributor Financed Benefit and your Other Contributions (OC) Account can be invested into one of the six (6) investment options available. Please note, you can only select one (1) investment option for your account. Please invest my account balance and future contributions as indicated below:

Investment option	Please tick one
High Growth	<input type="checkbox"/>
Growth	<input type="checkbox"/>
Balanced	<input type="checkbox"/>
Conservative Balanced	<input type="checkbox"/>
Conservative	<input type="checkbox"/>
Cash	<input type="checkbox"/>

Important information

If no election is made, your Contributor Financed Benefit and Other Contributions (OC) Account will be invested into the Growth investment option. You can change this at any time online by logging into your account at eisuper.com.au/login or by calling us.

Your privacy is important to us

We are required to comply with relevant privacy laws. The personal information that we collect is used to process your application, administer your account(s), provide you with services and conduct research about how to improve our services and products. Unless required or authorised by law, we will only provide your personal information to authorised service providers who use the information to administer the Fund and provide services on our behalf.

The EISS Super Privacy Policy is available to view at eisuper.com.au/privacy or you can obtain a copy by contacting us on 1300 369 901.

Step 5. Member declaration

I declare and confirm that I:

- have read the Retirement Scheme Product Disclosure Statement (PDS) available at eisuper.com.au/pds;
- have fully read this form and the information I have provided is true and correct;
- understand that I should obtain financial advice should I need assistance in selecting an investment option/s;
- understand that any change to my investment strategy will take effect on the business day the Trustee receives this form; and
- have read the 'Your privacy is important to us' section and understand how EISS Super will use my personal information.

Member Signature

Date

Sign here

Step 6. Employer statement (to be completed by your employer)

I confirm that

commenced employment with

on / /

Name of authorised officer

Employer Signature

Date

 / /

Sign here