



It's easier than ever  
to sort out your super  
Rollover form



## Spend time now to save money later

### It pays to have your super in the one place

You generally pay fees for every super account you own, which can really eat into your super savings. Paying more fees than you need to just doesn't make sense. So to save more in the long run, spend a few minutes now.

### It's easier than ever before

Transferring your super to Cbus is easy and won't take long. All you need to do is follow the steps below.

## Two ways to roll over your super

### Combine online



The easiest way to combine your super is online. Simply log into your online account at [cbussuper.com.au/login](https://cbussuper.com.au/login) and go to *Consolidate your super*.

### Use the form



**1. Complete and sign the attached form**



**2. Send the form back to us using the address below.  
Cbus, Locked Bag 5056, Parramatta NSW 2124**

Or you can email your form to us.  
Visit [cbussuper.com.au/cs/id](https://cbussuper.com.au/cs/id) to learn how.

We'll do the rest, by transferring your super from your other fund to Cbus (this is known as a rollover).



## Lost track of your super?

If you're not sure what other super you might have, you can easily search for it online.

Log into your account at [cbussuper.com.au/login](https://cbussuper.com.au/login) and go to *Consolidate your super*. Here you can search for your super using your tax file number (TFN). You'll need to verify your identity so have your ID ready.

You can then easily transfer any super amounts found into your Cbus account. (Please note, any money held for you by the ATO will automatically be transferred to your Cbus account.)

**Note:** you can also track down your super using the ATO's myGov service at [my.gov.au](https://my.gov.au).

## Before you transfer your super, check:

- If the fund you're transferring from will stop other entitlements such as insurance.
- If you're eligible for adequate insurance cover and other benefits with Cbus, or if you can transfer your insurance cover to Cbus. Use the *Transfer my other insurance* form at [cbussuper.com.au/forms](https://cbussuper.com.au/forms).
- See the attached form for other important information you must consider before telling us to combine your super.

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Need help finding your lost super?  
Call us on **1300 361 784** and we can help you over the phone or arrange for a Cbus Coordinator to meet with you.

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**1300 361 784** 8am to 8pm (AEST/AEDT)  
Monday to Friday, closed on national public holidays



**cbusenq@cbussuper.com.au**  
**cbussuper.com.au**  
Log in to chat to us online



Cbus, Locked Bag 5056  
PARRAMATTA NSW 2124



Visit Cbus in person in Adelaide, Brisbane,  
Melbourne, Perth and Sydney.  
Details: **cbussuper.com.au/contact**



Arrange for a Cbus Coordinator to visit your workplace.  
Details: **cbussuper.com.au/coordinators**



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Issued by United Super Pty Ltd ABN 46 006 261 623 AFSL 233792 as Trustee for Cbus Super Fund ABN 75 493 363 262 offering Cbus and Media Super products.



# Roll over your super to Cbus

Complete this form to transfer money from your other super funds (except SMSFs) to your Cbus account. Please use black or blue pen and CAPITAL letters. Use an X in boxes where required.

**!** Don't want to fill in a form? It's easy to combine online. Just log into your account at [cbussuper.com.au/login](http://cbussuper.com.au/login) and go to Consolidate your super.

## Step 1: Provide your personal details

Title  Mr  Mrs  Miss  Ms  Other  Date of birth  /  /        Gender  Male  Female

Given name(s)

Family name

Other previous name(s)

Home phone  (  )        Mobile

Email address (providing your email means you give permission for Cbus to use it)

Tax file number (if you haven't already provided it)

**!** You don't have to give us your tax file number, but there may be tax consequences. Read about *Providing your TFN* on page 2 and visit [cbussuper.com.au/tfn](http://cbussuper.com.au/tfn) for more details.

**Residential address**

Street number  Street name

Suburb/town  State  Postcode

**Previous address (if you know that the address held by your FROM fund is different from your current residential address)**

Street number  Street name

Suburb/town  State  Postcode

## Step 2: Provide your fund details

To transfer your super from more funds you can attach another form or log into your account and combine your super online. **!** This transfer may close your account and cancel any insurance cover or any other entitlements associated with that account (you need to check this with your FROM fund).

<p><b>FROM (transferring)</b></p> <p>Fund name <input type="text"/></p> <p>Membership or account number <input type="text"/></p> <p>Fund phone number <input type="text"/></p> <p>Australian business number (ABN) <input type="text"/></p> <p>Unique Superannuation Identifier (USI) <input type="text"/></p> <p><b>Whole or partial balance rollover</b></p> <p><input type="checkbox"/> Whole – transfer the whole balance of this account, which will close your other super account.</p> <p><input type="checkbox"/> Partial – transfer this amount: \$ <input type="text"/> , <input type="text"/> , <input type="text"/> . <input type="text"/></p>	<p><b>FROM (transferring)</b></p> <p>Fund name <input type="text"/></p> <p>Membership or account number <input type="text"/></p> <p>Fund phone number <input type="text"/></p> <p>Australian business number (ABN) <input type="text"/></p> <p>Unique Superannuation Identifier (USI) <input type="text"/></p> <p><b>Whole or partial balance rollover</b></p> <p><input type="checkbox"/> Whole – transfer the whole balance of this account, which will close your other super account.</p> <p><input type="checkbox"/> Partial – transfer this amount: \$ <input type="text"/> , <input type="text"/> , <input type="text"/> . <input type="text"/></p>
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**TO (receiving)**

Fund name **CBUS**

Membership or account number

Australian business number (ABN) **75 493 363 262**

Fund phone number **1 3 0 0 3 6 1 7 8 4**

Unique Superannuation Identifier (USI) **CBU0100AU**

**!** **SMSF transfers:** You can't use this form to transfer money from a self-managed super fund to your Cbus account. You can do this through your online account or by completing a *Combine your super into Cbus* form available at [cbussuper.com.au/forms](http://cbussuper.com.au/forms).

### Step 3: Allow us to search for any other super you have

Tick the box if you want us to search for other super you might have. We'll get in touch to check your identity (so we can make sure the super belongs to you).

Cbus may use my TFN for the purpose of a SuperMatch search to find lost super held by the ATO and super with other funds (including any insurance cover), then notify me of the results. Super held by the ATO will be rolled into my Cbus account. Super with other funds will be rolled over upon my request.

This permission will be ongoing and we will store it. You can change this permission at any time once you have set up your online account, or call us on **1300 361 784**.

### Step 4: Sign and date this form

By signing this request form I confirm:

- I have fully read this form and the information completed is true and correct.
- I have read and understand the important information I need to consider when transferring my super (see below).
- If I have provided it, I consent to my tax file number being disclosed for the purposes of consolidating my account.
- I have considered where my future employer contributions will be paid.
- I'm aware I can ask my other super fund/s for information about any fees or charges that may apply, or any other information about the impact this transfer may have on my benefits, and I've obtained or do not require any further information.
- I understand that the other super fund will no longer have any liability for my account once it's transferred to Cbus.
- I understand that any insurance I have with my other super fund will stop and if I have applied to transfer this insurance cover to Cbus, I have waited for the insurer to accept my application before submitting this form.
- I request a transfer of super as described above and authorise the provider of each fund to action this transfer.

#### Privacy

Please refer to the *Cbus Privacy Policy* and *Personal Information Collection Statement* at [cbussuper.com.au/privacy](http://cbussuper.com.au/privacy) for details about how Cbus collects and discloses personal information or contact us on **1300 361 784** for a copy.



Sign here:

Date

D D / M M / 2 0 Y Y

#### Important information you must consider when combining your super

Combining your super can save you money and hassle, but there are a few important things to check first:

- **Fees** – Will the fund you're transferring from charge an early termination fee or other fees? How do fees and insurance premiums compare? This can make a big difference to how much you have when you retire.
- **Insurance cover** – Will you lose any insurance cover or other benefits? And are you eligible for enough insurance cover and other benefits with your chosen fund? You may be able to transfer your insurance to Cbus before you close that account (see below).
- **Contributions** – Can your employer contribute to your chosen fund?
- **Performance** – How have both funds performed over the medium to longer term? (But remember, past performance is not an indicator of future performance.)
- **Advice** – Will access to financial advice about your account be available as part of your membership?
- **Tax deductions for personal contributions** – Have you made any personal contributions into your other fund that you want to claim a tax deduction for? You'll need to do this before transferring your super.

#### Transfer your insurance cover first

If you're going to apply to transfer your insurance cover to Cbus, don't submit this form until the insurer accepts your application.

For more about insurance through Cbus, visit [cbussuper.com.au/insurance](http://cbussuper.com.au/insurance). To check if you're eligible to transfer cover to Cbus, use the *Application to transfer existing insurance cover* at [cbussuper.com.au/forms](http://cbussuper.com.au/forms).

#### This form won't change where your employer pays your super

Using this form won't change the fund your employer pays your super contributions into. To do that, speak to your employer and provide them with a completed *I want my super paid into Cbus* form, available at [cbussuper.com.au/forms](http://cbussuper.com.au/forms).

#### Providing your TFN

You don't have to provide your TFN to Cbus, but if you don't, you may be taxed at a higher rate and we won't be able to search for other super you might have. Learn more at [cbussuper.com.au/tfn](http://cbussuper.com.au/tfn).

Under the *Superannuation Industry (Supervision) Act 1993*, Cbus 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. Your TFN may be shared with another super provider, when your benefits are being transferred, unless you request in writing that your TFN is not shared.

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

If you have changed your name, you'll need a certified copy of your:

- |   |     |  |
|---|-----|--|
| ■ marriage certificate, or  | AND | ■ either a current driver's licence or passport. |
| ■ decree absolute (divorce certificate), or   |     |  |
| ■ deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office |     |  |

If you're signing on behalf of another person, you'll need to provide a certified copy of either guardianship papers, or a Power of Attorney, alongside certified or electronic ID for both you and the member.

#### This form cannot be used to:

- transfer benefits if you don't know where your super is
- change the fund your employer pays your super contributions into
- open a super account, or transfer benefits under certain conditions or circumstances (e.g. if a super agreement under the *Family Law Act 1975* is in place)
- transfer super from a self-managed super fund - you can do this through your online account or by completing the *Combine your super* into Cbus form available at [cbussuper.com.au/forms](http://cbussuper.com.au/forms).

Return your form to Cbus, Locked Bag 5056 Parramatta NSW 2124. Or email it to us – visit [cbussuper.com.au/cs/id](http://cbussuper.com.au/cs/id) to learn how.