

Important information

This form must be mailed to: **Resolution Life, GPO Box 3306, Sydney NSW 2001**

Contact phone number: **1800 624 100** 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@aia.com**

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**.

Section 1 – Personal details (all fields must be completed)

Title Mr Mrs Miss Ms Other Gender Male Female

Given name(s) Surname Date of birth (dd/mm/yyyy)

Residential address (PO Box is not acceptable)

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

State Postcode Country

Mobile number

Alternate phone number

Email address

Tax file number[#]

[#]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.

Section 2 – Fund details

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

Fund name

From:

Fund address

State Postcode Country

Membership or Account number

Australian business number (ABN)

Unique Superannuation Identifier (USI)

Section 2 – Fund details (continued)

To:

ABN Unique Superannuation Identifier (USI)

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

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

Fund name

From:

Fund address

Membership or Account number Australian business number (ABN) Unique Superannuation Identifier (USI)

To:

ABN Unique Superannuation Identifier (USI)

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

Section 3 – Declaration and acknowledgment

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 **block** letters)

Member's signature

Date (dd/mm/yyyy)

Section 4 – Proof of identity

No identification is required for rollovers where your Tax File Number (TFN) is validated via the ATO SuperTic 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.