

Rollover into the Mercer Super Trust

Roll other super money into the Mercer Super Trust

If you have super with more than one provider, you will need to complete a separate rollover form for each amount. Once the funds have been received and credited to your Mercer Super account, you will receive confirmation from us.

If you need help

For assistance or to access the Privacy Policy and your personal information call the Helpline on **1800 682 525** Monday - Friday 8am to 7pm (AEST/AEDT).



This form can be completed digitally or by hand with a black or blue pen in uppercase with one character per box.
Please note the form must be signed with a pen. The form cannot be signed digitally.

Want to make this quicker and easier?

Did you know you can request a rollover into your Mercer Super Account through the Member online portal? It's faster, easier and more secure for you www.mercersuper.com.au

Having trouble? Here's some troubleshooting information to help get you logged in www.mercersuper.com.au/member-online-and-mercero-super-app

Step 1: Complete your personal details

Title: Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other Date of birth / /

Given names

Surname

Residential address

Suburb

State

Postcode

Postal address (if different to above)

Suburb

State

Postcode

Telephone number

-

Mobile number

E-mail

Membership number

Account number

Plan/Product name

Name of employer

Name of previous fund or policy

Previous fund's Unique Superannuation Identifier (USI)/Electronic Service Address (ESA)*Telephone numberFund ABN*

Membership or policy number

* A rollover from another fund cannot occur without the ABN, USI/ESA and Membership/Policy Number of the fund you are transferring. All payments from a Self Managed Super Fund (SMSF) must use SuperStream to roll over your super benefits. This means for a SMSF rollover you will need to supply the Electronic Service Address (ESA) and ABN.

This will be a:

☐ Full Rollover* ☐ Partial Rollover

The partial rollover amount will be

[illegible]

Example: \$10,000.99

* If you consolidate the full balance of any other super account(s) you hold into your Mercer Super account, this will close your other account(s). Any insurance held on your other account(s) may cease when it closes. Reach out to you previous fund for information about any fees and charges that may apply to the transfer and information about the effect of the transfer on any entitlements.

We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information about the other products and services offered by us and our related companies. If you do not wish to receive marketing material, please contact us on **1800 682 525**.

Our Privacy Policy is available to view at [mercersuper.com.au/privacy](https://www.mercersuper.com.au/privacy) or you can obtain a copy by contacting us on **1800 682 525**.

If you do not provide the personal information requested, we may not be able to manage your superannuation.

We may sometimes collect information about you from third parties such as your employer, a previous super fund, your financial adviser, our related entities and publicly available sources.

We may disclose your information to various organisations in order to manage your super, including your employer, the fund's administrator, our professional advisors, insurers, our related companies which provide services or products relevant to the provision of your super, any relevant government authority that requires your personal information to be disclosed, and our other service providers used to assist with managing your super.

In managing your super your personal information will be disclosed to service providers in another country, most likely to our administrator's processing centre in India. Our Privacy Policy lists all other relevant offshore locations.

Our Privacy Policy sets out in more detail how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact us on **1800 682 525** or write to our Privacy Officer, **GPO Box 4303, Melbourne, VIC, 3001**.

Step 4: Sign the form

By signing this form I understand that:

- I am consenting to the transfer of super, as requested within this form, to the Mercer Super Trust.
- My personal information will be collected, disclosed, and used by the trustee of the Mercer Super Trust to process my rollover.
- Upon payment by my previous super fund, I discharge that fund from any further liability regarding the amount transferred.
- I will receive confirmation once my funds have been received by the Mercer Super Trust.
- I have the right to request information from my previous super fund regarding my entitlements, including any fees and charges that may apply to the transfer and the impact of the transfer on my entitlements. I confirm that I do not require such information from my previous fund.

Signature

X

Date

/ /

Make sure you sign and date your completed form and send it to: Mercer Super Trust, GPO Box 4303 Melbourne 3001.

3 easy ways to return your form

To make submitting your completed form as simple as possible, we've provided three easy options for you to choose from. Please read through the choices below and select the one that's most convenient for you.



Use Member Online

The fastest and more secure way to send back your forms is through the contact us page within Member Online. Simply save and attach the PDF of your completed form and you're done.

www.mercersuper.com.au



Email Us*

Another way to send back your form is via email. It's quicker if you use your email address you use to log in and send to

MST@Mercer.com

Please see below note for submitting forms via email.



Post it back

Otherwise, you can always send it back to us using the below postal address

**Mercer Super Trust,
GPO Box 4303,
Melbourne, VIC 3001**

*Email note:

This is a 'no-reply' mailbox and should only be used to submit a form.

- Only one form per email can be accepted to ensure each form and its supporting documentation is processed correctly.
- A total of 6 attachments per form/email with a maximum size limit of 14MB.
- The file formats accepted are PDF, JPEG, PNG and JPG.

If you have an inquiry, please submit this via the contact us page or call the helpline on **1800 682 525**.