



## Step 2 – Provide details of your UK scheme

If you would like to give the trustee of Equipsuper the authority to deal with your UK scheme directly, please provide the following details. A separate form should be completed if you are transferring benefits from more than one UK scheme. Note, if no details are provided, it will be assumed that you will contact your UK scheme directly to arrange the transfer of your UK benefit. The trustee will not take any further action until requested to by the UK scheme. The reference number for the scheme is QROPS500917.

Name of the UK scheme

Address of UK scheme

  


Postcode

Contact person (if available)

Membership or policy number

National Insurance Number

Approximate value of UK benefit

AUD \$

## Step 3 – Sign the form

I understand that:

- I confirm that I am a member of Equipsuper
- in accordance with Australian legislation, the trustee of Equipsuper may be unable to accept all or part of the benefit transferred from my UK pension scheme and may be required to return all or part of the amount transferred to my UK pension scheme
- the trustee of Equipsuper accepts no responsibility for any fees charged or losses incurred in the event that it is unable to accept any part of the benefit transferred and it is returned to my UK pension scheme
- if I am a UK resident at the time the trustee of Equipsuper makes a payment in respect of me (or have been a UK resident at any time in the previous 5 UK tax years), the trustee has an obligation to report details of such payments to the UK authorities
- a UK tax liability could arise in relation to payments made in respect of me while I am a UK resident (or have been a UK resident at any time in the previous 5 UK tax years). I understand also that the UK authorities will bill me directly for any such tax and that I will be responsible for payment of such tax
- if I elect to transfer part or all of my benefit in Equipsuper (which may include a UK transfer amount) to any other superannuation fund in the future, it is my responsibility to check whether the new fund has been accepted as a QROPS
- the trustee of Equipsuper accepts no responsibility for any UK tax payable in relation to any payments made in respect of me
- it is my responsibility to advise the trustee if there are any changes to the details of my UK residency status as advised on this form
- information contained in this form will be used by the trustee to process my transfer. For this purpose, my personal information may pass between the trustee of Equipsuper and its administrator, professional advisers, insurers, government bodies and other parties as required, including the trustee of any other super fund that my super is transferred to. I consent to the handling of my personal information in this manner. I can access my information by contacting the Privacy Officer of Equipsuper.
- acknowledge that if I've provided my email address details and/or mobile number in this form, the Trustee may, at its discretion, use that email address and/or mobile number to send information, including any member and exit statements and notices of any material changes or the occurrence of significant events, by electronic means
- I have read and understood the fact sheet *How do I arrange my UK pension fund transfer*.

Signature

X

Date

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The trustee of Equipsuper recommends that you seek advice from a licensed, or appropriately authorised, financial adviser regarding your super before making a decision to transfer.

**Please return your completed form to Equipsuper, GPO Box 4303, Melbourne, VIC 3001.**

