

# Request to transfer super benefits to Panorama Super

## Use this form to:

Request a full or partial transfer of your superannuation benefits from another fund to Panorama Super. Send this form to the FROM (Transferring) fund. Alternatively, your adviser may place this request via [panorama.com.au](http://panorama.com.au)

### This form can NOT be used to:

- Transfer benefits from multiple funds on this one form. A separate form must be completed for each FROM (Transferring) fund.
- Change the fund to which your employer pays contributions on your behalf.
- Open a superannuation account.
- Transfer benefits under certain conditions or circumstances, for example, if there is a superannuation agreement under the Family Law Act 1975 in place.

You can type directly into the form and print before signing. Alternatively, print and complete in block letters using a blue or black pen. Place a cross in boxes where applicable. Please complete all mandatory fields marked with an \*.

## Important information

### Retirement planning tools

To help you with planning and achieving your retirement goals, our 'Optimise your super' page offers support tools including a checklist, key themes, and links to educational content and tools to get you started. And if you have a financial adviser, they can work with you to make sure you are getting the most out of your super in retirement. You can visit this page by [logging in to your Panorama account](#).

### Privacy Statement

All personal information and credit-related information we collect about you is collected, used and disclosed by us in accordance with our Privacy Statement which is available at [www.bt.com.au/personal/help/privacy/privacy-statement](http://www.bt.com.au/personal/help/privacy/privacy-statement) or by calling us. Our Privacy Statement also provides information about how you can access and correct your personal information, and make a complaint. You do not have to provide us with any personal information or credit information but, if you don't, we may not be able to process your request.

## Personal details

### Title

Mr      Mrs      Ms      Miss

Other

\*Given name

\*Last name

### Other/previous names

\*Date of birth (dd/mm/yyyy)

\*Gender

Male      Female

Contact phone number

\*Residential address

\*Suburb      \*State      \*Postcode

### Previous address

If you know the FROM (Transferring) fund does not have your current residential address, provide your previous address details below.

Suburb      State      Postcode



## Request to transfer super benefits to Panorama Super

### 2 Tax file number

#### Tax File Number

You are not obliged to provide us with your Tax File Number (TFN). However, providing us with your TFN gives you advantages which may not apply if you choose to withhold your TFN, as detailed in Section 11 of our Privacy Statement. Please contact the Australian Taxation Office for more information about your TFN and its use.

Any details you do provide us (including your TFN) that are personal information will be collected, used and disclosed in accordance with our Privacy Statements (in particular please see Section 11 as regards TFNs) which is available at [www.bt.com.au/privacy/privacy-statement](http://www.bt.com.au/privacy/privacy-statement) or by calling us.

### 3 Fund details

#### FROM (Transferring fund)

\*Fund name

Fund address

Suburb State Postcode

Fund phone number

Electronic Service Address (ESA) Alias

Mandatory if rolling over from a self-managed super fund (SMSF)

Fund ABN

Unique Superannuation Identifier (USI)

This is not required if rolling over from an SMSF

\*Member number

This is not required if rolling over from an SMSF

#### Amount to be transferred to Panorama Super

Full balance

Partial amount of

\$

If you have multiple account numbers with this fund, you must complete a separate form for each account you wish to transfer.

If you are transferring a partial amount, please ensure you specify the amount to be transferred to your Panorama Super account, and not the balance that will be left with the FROM (Transferring) fund.

#### Important:

If you have made personal contributions to the FROM (Transferring) fund in the current or previous financial year and you have not completed a Personal Tax Deduction notice for those contributions, please contact the FROM (Transferring) fund named in section 3 for more information.

#### TO (Receiving fund)

Fund name Fund phone number  
Panorama Super 1300 881 716

Fund address Fund ABN  
BT Panorama, 90 194 410 365  
GPO Box 2861, Adelaide SA 5001

Unique Superannuation Identifier (USI)  
Panorama Super (USI 90 194 410 365 011)

\*Account number

### 4 Adviser details (if applicable)

Dealer group name

First name

Last name



DEC-X-BTF32020

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## 5 Authorisation

By signing this request form I am making the following statements:

- 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 any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits, and have obtained or do not require any such information.
- I discharge the superannuation provider of my FROM (Transferring) fund of all further liability in respect of the benefits paid and transferred to my TO (Receiving) fund.

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.

\*Full name (please print)

\*Client signature ([Wet \(pen\) signature](#) required)

\*Date (dd/mm/yyyy)

## 6 Checklist

- Have you read the important information in section 7?
- Have you considered where your future employer contributions will be paid?
- Have you checked your TO (Receiving) fund can accept the transfer?
- Have you completed all of the mandatory fields on the form?
- Have you signed and dated the form?

### You can submit this form by:



Sending it to the FROM (Transferring) fund described in section 3. The form must be signed and dated by hand.

## 7 Important information

### What happens to my future employer contributions?

By completing this form you are requesting a transfer of your superannuation benefit between funds.

Using this form to transfer your benefits will not change where your employer pays your contributions and may close your account with the transferring super fund.

You must use the Standard Choice Form to direct where your employer pays your contributions.

If you want to change the fund where your contributions are being paid, speak to your employer about Super Choice. For the appropriate forms and information about whether you are eligible to choose the fund where your employer contributions are made, visit [www.superchoice.gov.au](http://www.superchoice.gov.au) or call the Australian Taxation Office on 13 10 20.

### Important note:

You may need to ensure that you have enough cash available in your FROM (Transferring) fund, for the transfer to proceed. Also, this transfer may close your account. You will need to check with your FROM (Transferring) fund.

### Things you need to consider when transferring your superannuation

When you transfer your superannuation, your entitlements under that fund may cease. You need to consider all relevant information before you make a decision to transfer your superannuation. If you ask for information, your superannuation provider must give it to you. Some of the points you may consider are:

- **Fees**  
Your FROM (Transferring) fund must give you information about any exit or withdrawal fees. If you are not aware of the fees that may apply, you should contact your fund for further information before completing this form. The fees could include administration fees as well as exit or withdrawal fees. Your TO (Receiving) fund may also charge entry or deposit fees on transfer. Differences in fees that funds may charge can have a significant effect on what you will have to retire on. For example, a 1% increase in fees may significantly reduce your final benefit.
- **Death and disability benefits**  
Your FROM (Transferring) fund may insure you against death, illness or an accident which leaves you unable to return to work. If you choose to leave your current fund, you may lose any insurance entitlements you have. Other funds may not offer insurance, or may require you to pass a medical examination before they cover you. When considering a new fund, you may wish to check the costs and amount of any cover offered.



## Request to transfer super benefits to Panorama Super

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

If you have changed your name or are signing on behalf of the applicant, you will need to provide a certified linking document. A linking document is a document that proves a relationship exists between two (or more) names.

The following table contains information about suitable linking documents.

| Purpose                           | Suitable linking documents  |
|-----------------------------------|---|
| Change of name                    | Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office |
| Signed on behalf of the applicant | Guardianship papers or Power of Attorney  |

#### More information:

For more information about superannuation, visit:

- Australian Securities and Investments Commission website at [www.moneysmart.gov.au](http://www.moneysmart.gov.au)
- Australian Taxation Office website at [www.ato.gov.au/super](http://www.ato.gov.au/super)

For more information about this form, you can call the Australian Taxation Office on 13 10 20.

