



SuperMatch search authority and transfer form

Complete this form to authorise IOOF Investment Management Limited ABN 53 006 695 021 AFS Licence 230524 (IIML), as Trustee of the IOOF Portfolio Service Superannuation Fund (IPS), to search for your super and roll over any super monies with other funds found in your name, or transfer any super money found in your name held by the Australian Taxation Office (ATO). IOOF will locate your super using the ATO electronic search facility and will notify you of the results via email. After 10 business days we will commence processing your request.

Alternatively, log in to ioofonline.com.au and consolidate your ATO held and other super into your IOOF account with a few clicks of a mouse.

Any personal information provided in this form will be handled in accordance with the Trustee's privacy policy, available at ioof.com.au/privacy.

IOOF account number*	<input type="text"/>																										
Title (Dr/Mr/Mrs/Ms/Miss)	<input type="text"/>			Surname	<input type="text"/>																						
Given name(s)	<input type="text"/>																										
Mailing address	<input type="text"/>																										
Suburb	<input type="text"/>														State	<input type="text"/>			Postcode	<input type="text"/>							
Phone (home)	<input type="text"/>		<input type="text"/>			<input type="text"/>			Phone (work)	<input type="text"/>		<input type="text"/>			<input type="text"/>												
Phone (mobile)	<input type="text"/>			<input type="text"/>			<input type="text"/>																				
Email	<input type="text"/>																										
Date of birth	<input type="text"/>		/	<input type="text"/>		/	<input type="text"/>																				

*if known

A Search authority

Please tick the following box to authorise IIML to search for your super and notify you of the search results, and transfer any ATO held super to your IOOF super account.

By ticking this box, I authorise IIML to store, use and disclose my tax file number (TFN) and any other information held by IIML, as authorised by law, to contact the Australian Taxation Office (ATO) or use SuperMatch (or such other ATO authorised search facilities), contact other super funds identified by the search result, to find out if I have other super monies, and to meet any requirements set by the relevant super laws, the ATO or other regulatory authorities in relation to consolidating my super accounts. I understand that my consent provided in relation to the use, storage and disclosure of my TFN when I provided IIML with my TFN details continues to apply unaffected.

(Note: If you only want to be notified of the search results, do not complete Part B of this form.)

To roll over any funds found in the above search, please complete section B on the following page.

B Instruction to roll over

Please tick the following box if you wish to instruct IIML to roll over any super monies located from the SuperMatch search.

By ticking this box, I instruct IIML to rollover to my IOOF super account the total balance of any accounts held by other super funds found as a result of any searches authorised to be conducted.

- I authorise the deduction of the transfer fees, if applicable, by my previous super fund from the super monies rolled over to my IOOF super account.
- I am aware that I may ask IOOF for information about any fees or charges that may apply to a rollover, or any other information about the effect that the rollover may have on my super monies, and do not require such further information.
- I am aware that rolling over my lost super or super spread across multiple accounts to my IOOF super account will not change the fund to which my employer pays my contributions.
- I am aware that if I wish to change the fund into which my contributions are being paid, I will need to speak to my employer about whether I am eligible to choose the fund to which my employer contributions are made.
- I acknowledge that IIML cannot guarantee that all of my super accounts will be found and/or transferred to my IOOF super account despite all reasonable efforts being made.
- I am aware that any insurance attached to my accounts may be cancelled as a result of transferring my super monies to my IOOF super account.
- I am aware that I have the ability to increase the level of insurance cover in my IOOF super account, however any increases are subject to underwriting requirements and I may not get the same type of insurance cover in my IOOF super account.

If you are aware of other super funds you DO NOT want transferred, please list below

Fund name	Account/Membership number

Member signature

I release IIML and its related bodies corporate from liability for any loss or damages arising from the use of this service, either direct or incidental.

I understand these authorisations remain in force for as long as I hold an IOOF super account and I may choose to revoke this authorisation at any time by contacting IIML.

Member signature

Signature

Date

 / /

Please forward all correspondence and enquiries to

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Email membersupport@ioof.com.au
Telephone 1800 119 062
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Web www.ioof.com.au