

Ongoing rollover transfer request and authority form

This form gives ongoing authority for ClearView as administrator of ClearView ClearChoice Super/ ClearView LifeSolutions Super to perform the following transactions on your behalf for covers held in ClearView ClearChoice Super or ClearView LifeSolutions Super by you:

- **Inward rollover transfer:** transfer funds with ongoing partial rollovers (tax paid) **FROM another nominated superannuation fund TO the HUB24 Super Fund** to fund the premiums for your ClearView ClearChoice Super or ClearView LifeSolutions Super policy. If you wish to fund your super premiums with a rollover of a single lump sum amount, please contact us at 132 979.
- **Outward rollover transfer:** transfer funds within super (such as claim proceeds and refunds) **FROM the HUB24 Super Fund TO another nominated superannuation fund.**

Tip: Complete both inward and outward transfer authorities now to make future transactions faster and avoid potential additional paperwork later.

Please complete a separate form for each policy and return the form(s) to ClearView.

Personal details

Title

Mr Mrs Ms Miss Dr Other

Date of birth

Given name(s)

Surname

Residential address or mailing address

Street number and name

Suburb

State

Postcode

Contact details

Home number ()

Work number ()

Mobile

Email address

Tax file number (TFN)

Declining to quote your TFN is not an offence. However, if you do not provide your TFN, ClearView will not accept your application. Please refer to the ClearView ClearChoice or ClearView LifeSolutions PDS for details.

TFN - -

Please select and complete the ClearView account you wish to transfer superannuation TO and FROM

If you have multiple account numbers with the HUB24 Super Fund, you must complete a separate form for each account you wish to transfer funds from.

HUB24 Super Fund - ClearView ClearChoice Super

Australian Business Number (ABN)
 6 0 9 1 0 1 9 0 5 2 3

Fund name
 C L E A R V I E W
 C L E A R C H O I C E
 S U P E R

ClearView ClearChoice Super is a division of the HUB24 Super Fund

Policy number 5 5 Fund phone number 1 3 2 9 7 9

Unique Superannuation Identifier (USI)
 6 0 9 1 0 1 9 0 5 2 3 0 0 2

HUB24 Super Fund - ClearView LifeSolutions Super

Australian Business Number (ABN)
 6 0 9 1 0 1 9 0 5 2 3

Fund name
 C L E A R V I E W
 L I F E S O L U T I O N S
 S U P E R R O L L O V E R

ClearView LifeSolutions Super is a division of the HUB24 Super Fund

Policy number Fund phone 1 3 2 9 7 9

Unique Superannuation Identifier (USI)
 N R M 0 0 4 3 A U

Notice of complying superannuation fund

This notice confirms that the HUB24 Super Fund (Fund) (of which ClearView ClearChoice Super and ClearView LifeSolutions Super are part):

- is a resident regulated superannuation fund within the meaning of the SIS Act; and
- is not subject to a direction under section 63 of the SIS Act

Pursuant to section 25 of the Superannuation Guarantee (Administration) Act 1992 (Cth), a contribution by an employer for the benefit of an employee to the Fund is conclusively presumed to be a contribution to a complying superannuation fund if the employer receives a copy of this Complying Superannuation Fund Notice at or before the time that the contribution is made, except in the limited circumstances set out in that section.

Nominated superannuation fund details (please complete for all requests including SMSF)

Australian Business Number (ABN)

Fund name

Membership or account number

Fund phone number

()

Unique Superannuation Identifier (USI) - non-SMSF

If you have multiple account numbers with this fund, you must complete a separate form for each account you wish to transfer funds from. If this fund is an SMSF, you will need to complete a rollover authority for each transaction.

For SMSFs only

Account name

BSB number

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Account number

Electronic service address

Inward rollover transfer authorisation to the HUB24 Super Fund

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

Sign this section to authorise transfer of funds with ongoing partial rollovers (tax paid) FROM another nominated superannuation fund TO the HUB24 Super Fund to fund the premiums for your ClearView ClearChoice Super or ClearView LifeSolutions Super policy. If you wish to fund your super premiums with a rollover of a single lump sum amount, please contact us at 132 979.

- I am aware I may ask my superannuation provider for any information I reasonably require for the purpose of understanding my benefit entitlements, including information about any fees and charges that may apply or any other information about the effect this transfer may have on my benefits, and that I do not require any further information.
- If I am providing my TFN, I have read and understand the 'Tax File Number (TFN)' section in the ClearView ClearChoice PDS and Policy Document or ClearView LifeSolutions PDS and Policy Document as the case may be setting out information with respect to the collection of tax file numbers.
- I am aware of any fees and charges that may apply in relation to a full or partial rollover of benefits from any other superannuation account, and I have considered where my future contributions will be paid and the effect of the rollover on any benefit entitlements (including insurance).
- If my nominated superannuation fund is a self managed superannuation fund (SMSF), I confirm that I am a trustee (or director of a corporate trustee) of the SMSF.
- I discharge the superannuation provider of my nominated superannuation fund of all further liability in respect of the benefits paid and transferred to the HUB24 Super Fund.

- I authorise my financial adviser and representatives of the Trustee of the HUB24 Super Fund to make inquiries and be provided with information about this transfer on my behalf.
- I request and consent to the transfer of superannuation from my nominated superannuation account on an annual basis for the full amount of my annual insurance premium (less any rollover tax benefit applicable) and authorise the superannuation provider of each fund to give effect to this transfer.
- If an amount of superannuation that exceeds the insurance premium due is received by the HUB24 Super Fund, on my account, from my nominated superannuation fund, I consent to and authorise the transfer or rollover of the excess FROM the HUB24 Super Fund TO my nominated superannuation fund.
- This authority continues until the earliest of the following:
 - it is revoked by me in writing;
 - the HUB24 Super Fund receives a replacement authority signed by me;
 - If this authority relates to ClearView ClearChoice - my cover in ClearView ClearChoice Super ceases;
 - If this authority relates to ClearView LifeSolutions - my cover in ClearView LifeSolutions Super ceases; or
 - I die.

Name

Signature

Date

Outward rollover transfer authorisation from the HUB24 Super Fund

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

Sign this section to authorise the transfer of funds within super (such as claim proceeds and refunds) FROM the HUB24 Super Fund TO another nominated superannuation fund.

- 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 any information I reasonably require for the purpose of understanding my benefit entitlements, including information about any fees and charges that may apply or any other information about the effect this transfer may have on my benefits, and that I do not require any further information.
- If my nominated superannuation fund is a self managed superannuation fund (SMSF), I confirm that I am a trustee (or director of a corporate trustee) of the SMSF.
- I discharge the superannuation provider of the HUB24 Super Fund of all further liability in respect of the benefits paid and transferred to my nominated superannuation fund.
- I authorise my financial adviser and representatives of the Trustee of the HUB24 Super Fund to make inquiries and be provided with information about this transfer on my behalf.
- If I hold a LifeSolutions Super product, I consent to and authorise the transfer or rollover of all funds invested in that product to my nominated superannuation fund.
- If a refund, interest, financial compensation, or the superannuation component of any claim proceeds (Monies) is received by the HUB24 Super Fund on my account, I consent to and authorise the transfer or rollover of those Monies FROM the HUB24 Super Fund TO my nominated superannuation fund.
- I authorise the trustee of the HUB24 Super Fund (or its administrator) and the trustee of my nominated superannuation fund to give effect to the transfers and rollovers referred to above.
- If I am providing my TFN, I have read and understand the 'Tax File Number (TFN)' section in the ClearView ClearChoice PDS and Policy Document or ClearView LifeSolutions PDS and Policy Document as the case may be (PDS), setting out information with respect to the collection of tax file numbers.
- I am aware of any fees and charges that may apply in relation to a full or partial rollover of benefits from any other superannuation account, and I have considered where my future contributions will be paid and the effect of the rollover on any benefit entitlements (including insurance).

