

Declaration to remain a member of Australian Catholic Superannuation



✉ PO Box 656, Burwood NSW 1805

☎ 1300 658 776

🌐 www.catholicssuper.com.au

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✉ fundoffice@catholicssuper.com.au

Simply complete this form using a dark pen and capital letters or type directly into this form online, print it out and send it to us. Ensure all appropriate check boxes are marked with an (X).

Once the form is complete, remember to sign and date it. Return the form to:

Australian Catholic Superannuation and Retirement Fund
PO Box 656, Burwood NSW 1805

1 Important information

What is this form about?

New superannuation laws require all superannuation accounts that are inactive low-balance on 30 June or 31 December of each year to be transferred to the Australian Taxation Office (ATO). The ATO will try to consolidate your account with an active account elsewhere. This rule **does not** apply to pension accounts.

What is an inactive low-balance account?

Your account is inactive low-balance if it is less than \$6,000 and we have not received a contribution or rollover into your account in the last 16 months.

What to do if I do not want my account transferred to the ATO?

You must complete this form to avoid having your account transferred to the ATO. This form authorises us to notify the ATO that you have declared to us that you would like your inactive low balance account to stay with our Fund and that the ATO cannot consolidate it for you.

If your balance is transferred to the ATO, you will **no longer be** a member of Australian Catholic Superannuation.

Note: This form will need to be completed again if you remain inactive for another 16 months after submission.

What happens if my account remains with the Fund?

If your inactive low-balance account remains with the Fund you will continue to be subject to fees and charges as normal. Your declaration will be valid for a period of 16 months from the date we notify the ATO.

What happens if I have more than one account with the Fund?

If you happen to have more than one superannuation account under your Client ID your declaration to remain a member of our Fund will cover all of them. You must tell us if you only want some and not all of your superannuation accounts to remain with our Fund.

Important

Client ID login allows you to access our service via the internet. Ask us about setting up this convenient service.

2 Your current details

Client ID		Date of birth		Male	Female						
1		D	D	M	M	Y	Y	Y	Y	<input type="checkbox"/>	<input type="checkbox"/>
Title	Surname										
<input type="text"/>	<input type="text"/>										
Given names											
<input type="text"/>											
Postal address											
<input type="text"/>											
Suburb								State		Postcode	
<input type="text"/>								<input type="text"/>		<input type="text"/>	
Country								Home telephone number			
<input type="text"/>								<input type="text"/>			
Email											
<input type="text"/>											

3 Declaration

By signing this form I:

- Declare that I would like to remain a member of the Fund despite having an inactive low-balance account;
- Understand that my declaration to remain a member of Australian Catholic Superannuation will cover all my superannuation interests under my Client ID; and
- Authorise Australian Catholic Superannuation to notify the ATO on my behalf that I would like my superannuation account/s under my Client ID not to be transferred to the ATO.

Signature



Date

D	D	M	M	Y	Y	Y	Y
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! Take note

Don't forget to sign and date your form before sending it back to us.

PRIVACY STATEMENT: Australian Catholic Superannuation collects and uses personal information in accordance with the *Australian Privacy Principles of the Privacy Act 1988 (Cth)* for the management and administration of the Fund as well as to comply with relevant legislation. Personal information may be disclosed to other parties, including persons authorised by the member, the Fund's insurer, government bodies and the trustee of any other fund a superannuation account is transferred to. To access personal information or for a copy of our Privacy Policy, visit catholicsuper.com.au or phone **1300 658 776**.

Contact us

Please sign and date this form and return it to us:



Australian Catholic Superannuation
and Retirement Fund
PO Box 656, Burwood NSW 1805

For more information contact our helpful staff:



1300 658 776



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@AskAusCathSuper