Rollover Benefits Form

Vanguard® Personal Pension Plan
Dated 1 March 2010

Please complete this form to rollover your superannuation benefit from another complying superannuation fund to Vanguard Personal Pension Plan. You will need one form for each of your former funds that you wish to rollover (you may photocopy this form if required or access additional copies at www.vanguard.com.au). Vanguard will then arrange for the rollover on your behalf. Please refer to page 31 of the PDS for more details.

Note: If you are not currently a member of the Vanguard Personal Pension Plan this form must be accompanied by a completed application form. Please complete the application form so that an account can be established.

1. Complete your personal details (please use block letters)

1.1

Title

Given name/s

Surname

Date of birth

1.2

Full residential address
*(must **NOT** be a PO Box)*

Suburb

State Postcode

Country

1.3

Postal address
(if different from above)

Suburb

State Postcode

Country

1.4 Have you recently changed your address?

NO ☐ YES ☐ →

If you know that the address held by your FROM fund is different to your current residential address, please give details below.

Previous address

Suburb

State Postcode

Country

1.5

Home telephone ( )

Business telephone ( )

Mobile telephone

E-mail address

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2. Details of your rollover institution

To process your rollover, we need full details of the fund from which you are rolling over your benefit.

Member number

Fund name (in full)

Suburb

State Postcode

Country

Amount to be transferred: *(please tick one)*

☐ Entire balance (your account will be closed)

☐ Partial amount of: $, , .

3. Confirm your rollover to Vanguard Personal Pension Plan

I authorise the transfer of my benefit (described above) from my previous fund, and where applicable any contributions still outstanding to my former fund, to the Vanguard Personal Pension Plan. I understand that the trustee of my previous fund is discharged of any further liability in respect of any amount transferred. I approve the deduction of transfer fees and government taxes (if any) from the benefits transferred (subject to legislative restrictions). I am aware that I may ask the trustee of my previous fund for information about my benefits within that fund and the fees and charges and other effects of this rollover and confirm that I do not require any further information. I authorise the trustee of my previous fund to provide Vanguard Personal Pension Plan with all relevant details of my membership and any other information required by law to effect this transfer.

Signature

Date

This form and cheques from rollover funds can be sent to Vanguard.

Cheques:
Make cheque payable to:
Vanguard Personal Pension Plan

Mail:
Vanguard Personal Pension Plan
GPO Box 3006FF
Melbourne Vic 3001