

PERSONAL SUPERANNUATION SOLUTIONS ROLLOVER REQUEST FORM

(IN SPECIE TRANSFER)

BELL POTTER PERSONAL SUPERANNUATION SOLUTIONS

BELL POTTER

WARNING! Transferring assets In Specie may not be permitted by all institutions. Transferring assets in this form does not eliminate the need to pay any tax on what is effectively a 'sale' from one entity to another. If you are unsure about how you will pay any required tax prior to transfer or the impact this may have on your benefit you should consult your financial adviser.

FUND DETAILS

Rollover Institution/Fund Administrator/Trustee

Institution Phone Number

Current Fund Name (if applicable)

Address

Policy/Account Number

MEMBER DETAILS

Title

Given Name(s)

Surname

Date of Birth (dd/mm/yyyy)

/ /

Address

TRANSFER DETAILS

Please transfer all my investments with your organisation IN SPECIE to:

Insert Name of Trustee(s)

as trustee for

Name of Fund

ABN

AUTHORISATION

I hereby authorise you to:

forward the balance of my account by cheque or via Electronic Funds Transfer to my nominated superannuation account; and

provide any other relevant or requested information regarding my account

To the Administrator of the Fund as follows:

Bell Potter Personal Superannuation Solutions PO Box 529 North Sydney NSW 2059

Please phone 1300 730 138 if you have any queries

Signature

Date (dd/mm/yyyy)

/ /

Compliance Statement

We wish to confirm the following in respect of the Fund:

1. The Fund is a Regulated Superannuation Fund for the purposes of SIS.
2. The governing trust deed of the Fund allows benefits to be transferred to the Fund, with no minimum amount applicable.
3. The Fund is administered to satisfy 'member protection standards' prescribed under SIS and the Regulations thereto.
4. Benefits under the Fund are subject to the preservation requirements prescribed under SIS and the Regulations thereto.
5. We are willing to accept the transfer of superannuation monies on a trustee to trustee basis.
6. Members are not permitted to borrow monies from the Fund.

Please note that this document complies with Reg. 6.29 – regulated superannuation funds, of the Superannuation Industry (Supervision) Act 1993.