

Inactive low-balance account notice form

Return this completed form to:

legalsuper
Locked Bag 5081
Parramatta NSW 2124

Email: mail@legalsuper.com.au

When to use the form?

You should complete this form if you have an inactive low-balance account with legalsuper and want this account to remain with legalsuper. An inactive low-balance account is when:

- no amount has been received to your account for your benefit within the last 16 months i.e a contribution or roll-in;
- the account balance is less than \$6,000;
- you have not met a prescribed condition of release;
- there is no insurance on the account; and
- in the last 16 months:
 - you have not changed your investment options or insurance coverage;
 - you have not made or amended a binding beneficiary nomination.

If your inactive low-balance account remains with legalsuper, your retirement savings will continue to be subject to fees and charges.

legalsuper is required to report and transfer inactive low balance accounts to the Australian Taxation Office (ATO) unless you tell us in writing that you do not want this to occur.

Once we receive this notice, you advise legalsuper that you want your legalsuper account to remain open and not be transferred to the ATO. We will then take the required actions to implement your request. This notice is valid for 16 months from when it is received by legalsuper.

For information relevant to your account if it remains active with legalsuper, please refer to the Product Disclosure Statement (PDS).

Things you should know

legalsuper needs to receive this form 30 days before the statement dates (31 October and 30 April each year), otherwise, legalsuper is required to report and pay your account to the ATO.

Your correctly completed notice will only be effective for 16 months of the date when legalsuper receives it. If your legalsuper account satisfies the inactive low-balance account criteria after the expiry of the 16 months, you will need to complete a new Inactive low-balance account notice form.

If your account remains with legalsuper, it will continue to be subject to fees and charges. This form contains information that is of a general nature and does not take into account your specific needs. You should consider your own financial position, objectives and requirements and read the legalsuper PDS before making any decision in relation to legalsuper. The PDS is available at legalsuper.com.au or by contacting us on **1800 060 312** or at mail@legalsuper.com.au.

Visit ASIC MoneySmart website at moneysmart.gov.au for more information or consult your financial advisor if you require advice on how to manage your super.

For more information about inactive low-balance accounts and accounts transferred to the ATO visit the ATO website at ato.gov.au

Privacy statement

legalsuper is seeking to collect your personal information in order to carry out your instructions in this notice. If you do not provide us with the information requested, we may not be able to carry out instructions or provide the services you require.

For further information about how personal information is handled and how you can access and correct your personal information, you can view the legalsuper Privacy Policy at legalsuper.com.au/privacy-policy or by calling us on **1800 060 312**.

About this form

There are three sections to the form. You need to complete all sections.

Section A Provide your personal details.

Section B Provide details of your legalsuper account that will remain with legalsuper and not be transferred to the ATO.

Section C Provide a declaration that you would like your legalsuper account to be treated as active, and for it to remain with legalsuper.

When completing this form

You must complete **ALL** sections of this form using blue or black pen.

Print clearly in block letters.

Place an X in the relevant box to authorise legalsuper to act on your behalf.

*DENOTES MANDATORY FIELD.

We're here to help

If you have any questions about your account, call us on **1800 060 312** between 8.00 am and 8.00 pm, AEST Monday to Friday or email mail@legalsuper.com.au

Section A: Your details

Mr Mrs Ms Miss Other

Surname*

Given name*

Other given name*

COMPLETE Date of birth (dd/mm/yyyy)* Gender Male Female

Postal Address*

Town or Suburb*

State* Postcode*

Email

Telephone Number*

Mobile Number

Section B: legalsuper account details

Fund Name

Fund ABN

Fund Unique Superannuation Identifier (USI)

legalsuper Membership Number*

Section C: Declaration

I declare that all information provided on this form is complete and correct, and that I am not a member of an inactive low-balance account and my account is to remain active with legalsuper and not be transferred to the ATO. I understand that legalsuper will implement this request if this correctly completed form is received 30 days before the ATO's statement dates (31 October and 30 April each year), noting that my request that the account is not treated as an inactive low balance account remains in effect for 16 months.

COMPLETE Signature

Date (dd/mm/yyyy)