



# Perpetual WealthFocus Super and Pension Plan

Equity Trustees Superannuation Limited ABN 50 055 641 757 AFSL 229757 RSE L0001458  
 Perpetual WealthFocus Superannuation Fund ABN 41 772 007 500 RSE R1057010

## Transfer authority

### 1. Applicant details

You must complete a separate Transfer authority for each fund you are transferring from.

title	Mr	<input type="checkbox"/>	Mrs	<input type="checkbox"/>	Miss	<input type="checkbox"/>	Ms	<input type="checkbox"/>	Other	<input type="checkbox"/>	date of birth	<input type="checkbox"/>	<input type="checkbox"/>	/	<input type="checkbox"/>	<input type="checkbox"/>	/	<input type="checkbox"/>	<input type="checkbox"/>	
first name(s)	<input type="text"/>																			
last name	<input type="text"/>																			
tax file number <sup>1</sup>	<input type="text"/>																			
1 You are not obligated by law to disclose your TFN, but there may be tax consequences if you do not provide it.																				
gender	<input type="checkbox"/>	male	<input type="checkbox"/>	female																
phone (after hours)	<input type="text"/>									phone (business hours)	<input type="text"/>									
phone (mobile)	<input type="text"/>																			
residential address	<input type="text"/>																			
suburb	<input type="text"/>									state	<input type="text"/>		postcode	<input type="text"/>						
country	<input type="text"/>																			
If the address held by your 'FROM' fund is different to your current address, please give details below.																				
previous address	<input type="text"/>																			
suburb	<input type="text"/>									state	<input type="text"/>		postcode	<input type="text"/>						
country	<input type="text"/>																			
email address	<input type="text"/>																			

### 2. Fund details

FROM	TO
fund name	Perpetual WealthFocus Superannuation Fund
fund address	fund phone number 1 8 0 0 0 2 2 0 3 3
fund phone number	client number (if known)
membership or account number	account number (if known)
Australian business number (ABN)	Australian business number (ABN) 4 1 7 7 2 0 0 7 5 0 0
Unique superannuation identifier	Unique superannuation identifier P E R 0 0 6 8 A U
	P E R 0 4 0 3 A U

**Transfer amount**

If you have multiple account numbers with this fund, you must complete a separate form for each account you wish to transfer.

I authorise the transfer of  the total value or  partial value \$  of my benefit in the above superannuation fund or policy to:

Equity Trustees Superannuation Limited, Perpetual WealthFocus Super Plan and Pension Plan, GPO Box 4171, Sydney NSW 2001.





# Perpetual WealthFocus Super and Pension Plan

Equity Trustees Superannuation Limited ABN 50 055 641 757 AFSL 229757 RSE L0001458  
Perpetual WealthFocus Superannuation Fund ABN 41 772 007 500 RSE R1057010

## Transfer authority to your self managed super fund

### 1. Applicant details

You must complete a separate Transfer authority for each fund you are transferring from.

Note: if you intend to claim a tax deduction for personal superannuation contributions made during the relevant financial year you must provide us with notice of your intention to claim a deduction before you lodge a transfer authority to your self managed super fund.

title	Mr	Mrs	Miss	Ms	other		date of birth	/	/				
first name(s)													
last name													
other/previous names													
tax file number <sup>1</sup>													
email address													
1 You are not obligated by law to disclose your TFN, but there may be tax consequences if you do not provide it.													
gender	male	female											
phone (after hours)						phone (business hours)							
residential address													
suburb						state			postcode				
If the address held by your 'FROM' fund is different to your current address, please give details below.													
previous address													
suburb						state			postcode				

### 2. Fund details

FROM	TO
fund name Perpetual WealthFocus Superannuation Fund	SMSF name
client number (if known)	fund phone number
account number (if known)	Australian business number (ABN)
Australian business number (ABN) 4 1 7 7 2 0 0 7 5 0 0	Electronic Service Number
Unique superannuation identifier P E R 0 0 6 8 A U P E R 0 4 0 3 A U	SMSF bank account details
Superannuation product identification number (SPIN)	SMSF Account name
	SMSF BSB
	SMSF Account number

**Transfer amount**

If you have multiple account numbers with this fund, you must complete a separate form for each account you wish to transfer.

I authorise the transfer of  the total value or  partial value \$  of my benefit in the above superannuation fund or policy to the SMSF named above.

### 3. Authorisation

By signing this request form I:

- declare I have fully read this form and the information completed is true and correct
- am aware I may ask my superannuation provider for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits, and do not require any further information
- consent to my tax file number being disclosed for the purposes of consolidating my account
- confirm that I am a member, trustee or director of a corporate trustee of the SMSF
- discharge the superannuation provider of my 'FROM' fund of all further liability in respect of the benefits paid and transferred to my 'TO' fund.

I request and consent to the transfer of superannuation as described above and authorise the superannuation provider of each fund to give effect to this transfer.

first name(s)	
last name	
signature	
date	/ /



## Perpetual WealthFocus Super and Pension Plan

Equity Trustees Superannuation Limited ABN 50 055 641 757 AFSL 229757 RSE L0001458  
Perpetual WealthFocus Superannuation Fund ABN 41 772 007 500 RSE R1057010

# Compliance Letter

This letter can be provided to the fund you are rolling over from in order to confirm that Perpetual WealthFocus Super Plan/Wholesale Super Plan and Perpetual WealthFocus Pension/Wholesale Pension Plan is part of a complying fund.

Level 18, Angel Place  
123 Pitt Street  
GPO Box 4171  
Sydney NSW 2001  
Australia

**Client Services**  
Telephone 1800 011 022

To Whom It May Concern,

**Perpetual WealthFocus Superannuation Fund  
(Perpetual WealthFocus Super Plan and Pension Plan)**

RSE Registration No. R1057010

Australian Business Number (ABN): 41 772 007 500

Superannuation Product Identification Number (SPIN): PER0068AU (Super Plan)

Superannuation Product Identification Number (SPIN): PER0403AU (Account Based Pension)

Perpetual WealthFocus Superannuation Fund (the Fund) is a complying superannuation fund constituted under a trust deed dated 26 May 1995 (as amended) (Trust Deed). The Trustee of the Fund is Equity Trustees Superannuation Limited.

The Trust Deed complies with the preservation and portability standards currently imposed on complying superannuation funds under the Superannuation Industry (Supervision) Act 1993 (Cth) and Regulations.

Yours faithfully

**as Trustee for Perpetual WealthFocus Superannuation Fund  
Equity Trustees Superannuation Limited**