



# Account consolidation checklist

Before you start, make sure you have these details with you:

- » Your **tax file number**.
- » **Proof of identity**, for example your driver's license, passport or birth certificate (documents must be certified).
- » Your fund's **superannuation product identification number (SPIN)**. Your fund can provide this for you.
- » Your fund's **unique superannuation identifier (USI)**. Your fund can provide this for you.
- » **Details of your previous fund**, including the name of the fund, its address and other details.



## 1. Complete your transfer online

This is the easiest and quickest way to move all your super into one account.

**Step 1** Create a **myGov account** then link the ATO to your account. If you already have a myGov account, just log in and click through to the ATO section.

**Step 2** Go to the 'Super' tab.

**Step 3** Choose the fund you want to transfer your money from (the 'transferring fund') and the fund you want to transfer your money to (the 'receiving fund') from the funds listed.

**Step 4** Confirm your selection and your funds should move your accounts into one account within three days.



## 2. Use the ATO's paper rollover form

**Step 1** Download a **rollover initiation form** from the ATO's website.

**Step 2** Complete a form for each fund you are transferring a benefit from.

**Step 3** Send the form to the fund you are moving your super money into.

**Step 4** The fund you have chosen to move your super money into then contacts the other fund and requests the transfer.

**Step 5** The other fund must transfer your super money within 30 days (for paper requests). Exceptions apply. See the **ATO website** for more information.



## 3. Contact your fund

Contact either the fund you want to move your money into or your current fund to let them know you want to consolidate your accounts. Many funds provide a service where they will consolidate accounts on your behalf. Check your fund's website for further details.