

# ENDURING ROLLOVER AUTHORITY REQUEST



## Tidswell Financial Services Limited (Trustee)

ABN 55 010 810 607, AFSL 237628, RSE L0000888

## NEOS Super Plan, a division of the max Super Fund (Fund)

ABN 22 508 720 840, RSE R1067897

## NobleOak Life Limited (Insurer)

ABN 85 087 648 708, AFSL 247302

## NEOS Life (NEOS), a registered business name of Australian Life Development Pty. Ltd. (Administrator)

ABN 96 617 129 914 AFSL 502759

### Completing this form

By completing this form, you consent to the rollover or transfer of part of the superannuation benefits from your nominated superannuation account, to the NEOS Super Plan, each year for the insurance premiums due on your NEOS Protection plan.

To make completing this form easier, you don't need to print it – simply save a copy to your computer, type in your responses and email the completed form back to us at [customerservice@neoslife.com.au](mailto:customerservice@neoslife.com.au).

Please ensure your nominated superannuation fund has a sufficient account balance to pay for your insurance premiums and to continue to meet any minimum balance requirements of that fund.

### Questions?

If you have any questions in relation to this form, please don't hesitate to contact us on 1300 090 188 or email us at [customerservice@neoslife.com.au](mailto:customerservice@neoslife.com.au).

## 1. Plan details

NEOS Protection plan number:

## 2. Member/insured person details

Title: Mr  Mrs  Miss  Ms  Other

Name: First name:  Middle name:  Last name:

Previous last name\*:  Gender:  Male  Female

Date of birth:  /  /

Tax file number:

*Under the Superannuation Industry (Supervision) Act 1993, your super fund is authorised to collect your TFN, which will only be used for lawful purposes. Your TFN will be used for identification purposes and will be disclosed to your other super provider, unless you request in writing that it's not disclosed. If we're unable to identify you, we may request additional information.*

### Current address

Street address:

Suburb:  State:  Postcode:

\*If you've changed your last name since you established your nominated superannuation fund, please include your previous last name.

### 3. Fund details

Please provide the details of your nominated superannuation fund from which partial rollovers or transfers will be made to the NEOS Super Plan on an ongoing basis.

Refer to your last benefit statement from your nominated fund to help you complete these details.

Fund name:	<input type="text"/>
Fund ABN:	<input type="text"/>
Fund USI:*	<input type="text"/>
Member number:	<input type="text"/>

\*USI stands for Unique Superannuation Identifier.

### 4. Authority and declaration

By submitting this Enduring Rollover Authority Request form to NEOS, I am making the following statements:

- I have been provided with a copy of the NEOS Super Plan Product Disclosure Statement (PDS) by my financial adviser and have read and understood the important information about the NEOS Super Plan contained within it.
- I have read the important information in the NEOS Super Plan PDS about my tax file number (TFN) and consent to providing my TFN for legal purposes, including finding my superannuation benefits, providing information to the ATO, and providing information to another superannuation fund in order to transfer benefits.
- I request and consent to the transfer, from time to time, of part of my account balance from my nominated superannuation fund to the NEOS Super Plan, a division of the max Super Fund and promoted by NEOS Life, or any successor fund, for the payment of my insurance premiums.
- I authorise Tidswell Financial Services Limited ABN 55 010 810 607 (being the Trustee of the max Super Fund) or the trustee of any successor fund, to act on my behalf in arranging the transfer.
- This authority continues until the earliest of the following:
  - I request in writing for this transfer authority to cease
  - I request in writing for this transfer authority to be replaced; and
  - the NEOS Protection plan otherwise ends in accordance with the terms and conditions of the NEOS Protection PDS.
- I authorise the administrator of the NEOS Super Plan, Australian Life Development Pty Ltd ABN 96 617 129 914 (trading as NEOS Life), or its delegate, to contact my nominated superannuation fund to obtain details relevant to transferring part of my account balance where required.
- I understand that I need to ensure my nominated superannuation fund has a sufficient account balance for an amount to be transferred to pay the insurance premiums required and to continue to meet any minimum balance requirements of that nominated superannuation fund.
- I understand that the trustee of my nominated superannuation fund is discharged from any further liability in respect of any account balance transferred to the NEOS Super Plan.
- I understand that transfer fees (if any) and/or exit fees or penalties from my nominated superannuation fund may be deducted from my remaining account balance (subject to legislative restrictions).
- I acknowledge that my insurance premiums will remain unpaid if the transfer does not proceed and that my insurance cover will lapse. I understand that I must contact NEOS Life immediately if I'm notified that the transfer has been unsuccessful.
- I agree that if the max Super Fund and Trustee change at any time, then this enduring rollover authority applies to authorise the trustee, and administrator of the successor fund, to arrange the transfer of part of my account balance from my nominated superannuation fund, into the successor fund, for the payment of my insurance premiums.

**Please return your completed form to [customerservice@neoslife.com.au](mailto:customerservice@neoslife.com.au)**



**neoslife.com.au**

GPO Box 239, Sydney NSW 2001

**e:** [customerservice@neoslife.com.au](mailto:customerservice@neoslife.com.au) **t:** 1300 090 188

NEOS Life (NEOS) is a registered business name of Australian Life Development Pty. Ltd. ABN 96 617 129 914 AFSL 502759. NEOS Protection is issued by NobleOak Life Limited (NobleOak) ABN 85 087 648 708 AFSL 247302. The NEOS Super Plan is issued by Tidswell Financial Services Ltd. (Tidswell) ABN 55 010 810 607 AFSL 237628 as Trustee of the max Superannuation Fund ABN 22 508 720 840, of which the NEOS Super Plan is a division. NEOS provides administration services in relation to NEOS Protection and the NEOS Super Plan on behalf of NobleOak and Tidswell.