

# Fact Sheet for individuals

Russell SuperSolution Master Trust

## Consolidate your super

We can help you consolidate your accounts. You could save time and money.

- » Why consolidate?
- » How to roll over

### Why you should consider consolidating accounts

Having more than one super account is not only confusing; it may also make it hard for you to see just how much super you've got. Consolidate your super and you'll:

- » **See your super picture more clearly** – you'll know exactly how much super you have, and can rest assured that none of your super is lost, so you're not missing out on any of your hard-earned savings.
- » **Control your position** – by watching one balance, it will be easier to manage your investment strategy and reach your retirement goals.
- » **Pay a reduced number of fees** – one super fund means one set of fees, not several, which may make a significant difference to your retirement savings over time.
- » **Save time** – with just one statement, you'll spend less time managing multiple accounts, so you can concentrate on watching your super's progress.

### How to roll over in 3 simple steps

#### STEP 1

Locate your other superannuation accounts.

You can refer to any superannuation statements you have received from other funds, ask your previous employers which super fund they used, or search for your lost super through SuperSeeker (an Australian Tax Office service).

SuperSeeker is located at

[www.ato.gov.au/super](http://www.ato.gov.au/super)

or can be accessed over the phone on **13 28 65.**\*

Before consolidating, check whether you will incur any unreasonable exit/withdrawal fees and if you will lose any insurance cover when you close the account.

#### STEP 2

Complete the *Rollover Form* found at [www.russell.com.au/forms](http://www.russell.com.au/forms) or call our Helpline on **1800 555 667** for a form. You will need a separate form for each super account you would like to transfer. Make sure you complete all the details of your membership in the other funds. You may need to contact them to clarify some

### » Have any questions?

**Helpline:**

1800 555 667

**Website:**

[www.russell.com.au/super](http://www.russell.com.au/super)

**Email:**

[yoursupersolution@russellsuper.com](mailto:yoursupersolution@russellsuper.com)

\* You will need your Tax File Number (TFN) to run a search.

information. Make sure you also attach the identification documents required with the form.

### STEP 3

Send your completed rollover form(s) to us with your identification document(s) and we'll do the rest. Your other funds may write to you for confirmation that you would like to transfer. It's worthwhile responding to these requests quickly to help get your super in order faster.

*Visit our website at [www.russell.com.au/forms](http://www.russell.com.au/forms) or call our Helpline on 1800 555 667 for a copy of the Rollover Form to get started.*