

Bendigo Superannuation

Inactive low-balance account declaration



You should complete this form if you have an inactive low-balance account and want this account to remain with your fund. Your declaration is valid for 16 months and will mean that your account will not be transferred to the Australian Taxation Office (ATO), in line with the Superannuation (Unclaimed Money and Lost Members) Act 1999.

Note that if your account is paid to the ATO, they will then try to transfer your money to your active super fund, if they can locate one for you, and if the transfer will take your total balance to \$6,000 or more. If the ATO are unable to transfer your super to an active account, your money will be kept with the ATO and you won't pay fees. When you claim your unclaimed super, any interest due is calculated using the consumer price index and will be included in the total amount being transferred.

Your declaration is not enduring. This means that if your account meets the definition of an inactive low-balance account in the future, and you do not want this account transferred to the ATO, you will need to complete a new declaration.

* Indicates a mandatory field

Your details

*Fund Name

*Member number

*Title *Surname

*Given name(s)

Current residential address (no PO box)

*Address

*Town/Suburb *State *Postcode

*Contact phone number Email

Member Declaration

I declare that I am not a member of an inactive low-balance account and I do not want my account transferred to the ATO. I understand that this declaration is only valid for 16 months.

*Member Signature *Date / /

The trustee and issuer of Bendigo SmartStart products (ABN 57 526 653 420) is Sandhurst Trustees Limited ABN 16 004 030 737 AFSL 237906, a subsidiary of Bendigo and Adelaide Bank Limited ABN 11 068 049 178 (the Bank).