



## Superannuation fund nomination

Instructions for nominating a superannuation fund or retirement savings account to receive your super entitlements.

**Last updated** 28 January 2022

You can nominate a superannuation fund or retirement savings account (RSA) to receive super entitlements we hold for you. The fund nomination will be linked to your client account and will be used to transfer any unclaimed super we receive for you, to your nominated superannuation fund. If you close the nominated fund account or have a new preference you must contact us to set up a new fund nomination.

A superannuation fund nomination can only be made over the phone. If you wish to make a fund nomination you must **phone us**.

A one-off fund nomination can be made by lodging a transfer request in our online services.

## Unclaimed super for 65 years of age or over

If you are 65 years or older you must call us if you want to lodge a fund nomination – this must be done before we receive any unclaimed super from your super fund.

You may not know if we are holding super for you. If you are approaching 65 years of age and have active super accounts, you may want to consider lodging a fund nomination with us to ensure that any future super amounts we hold for you will be sent to your nominated super fund. If you don't nominate a fund, we may transfer future amounts to your nominated bank account that you may not be able to

put back into super, it will be withdrawn from the superannuation system.

A superannuation fund nomination can only be made over the phone. If you wish to make a fund nomination you must **phone us**.

### **Find out about**

- Keeping track of your super
- ATO-held-super
- Online services for Individuals and sole traders

QC 17316

## **Our commitment to you**

We are committed to providing you with accurate, consistent and clear information to help you understand your rights and entitlements and meet your obligations.

If you follow our information and it turns out to be incorrect, or it is misleading and you make a mistake as a result, we will take that into account when determining what action, if any, we should take.

Some of the information on this website applies to a specific financial year. This is clearly marked. Make sure you have the information for the right year before making decisions based on that information.

If you feel that our information does not fully cover your circumstances, or you are unsure how it applies to you, contact us or seek professional advice.

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