

How to add, remove or transfer a superannuation fund association

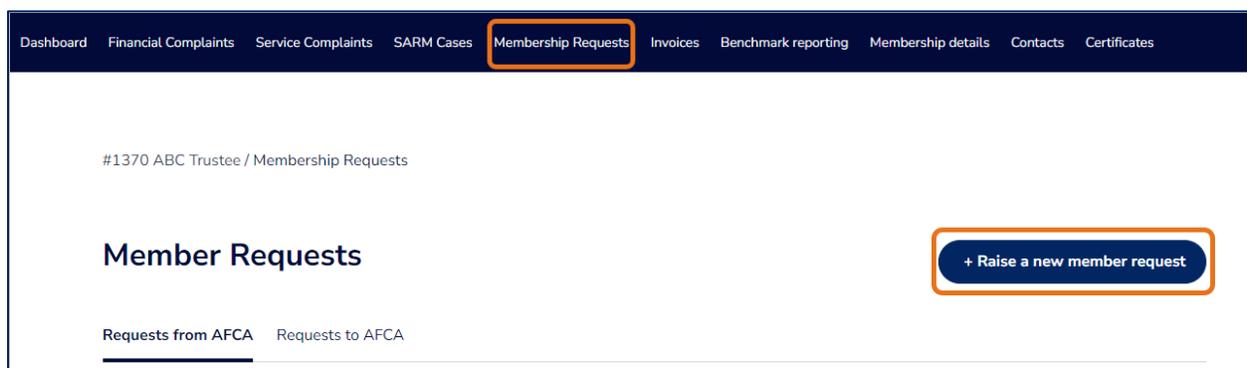
This is a guide to adding, removing or transferring the ownership of a superfund on your membership in the member portal.

Superannuation funds are not considered members and are set up as non-member records, however, the trustees they are associated to are members. A trustee can be related to multiple superannuation funds and trustees can transfer superannuation funds to other trustees. However, a superannuation fund can only be linked to one trustee at a time.

Adding a new superannuation fund

Administrator contacts of trustees can submit a request to add a new superannuation fund through the portal.

1. Log in to the portal and click on the **Membership Requests** tab.
2. Click Raise a new member request.



3. Select **Add new superannuation fund** and click **Next**.

Dashboard Financial Complaints Service Complaints SARM Cases **Membership Requests** Invoices Benchmark reporting Membership details Contacts Certificates

#1370 ABC Trustee / Member Requests

Select the type of request you would like to raise

Member Request Type Required

Add new superannuation fund

Provide details about a new superannuation fund associated with your membership.

Next

4. Fill in the required fields and click **Submit**.

Add new superannuation fund

Please select the super fund name:

Fund Name Required

ABN Required

Fund Registration Number Required

Fund Type Required

Registration Classification Required

Enter the date this is effective from: Required

DDMMYYYY

Please type your message or details of your request here Required

Please attach any documents relevant to your request

Add Documents

File Name Created On

There are no records to display.

Previous Submit Cancel

Removing a superannuation fund

Administrator contacts can end a superannuation fund association in the portal. This is only to be actioned if a fund has been closed without a superannuation fund transfer.

1. Log in to the portal and click on the **Membership Details** tab.
2. Click Associations.
3. The associated superannuation funds will appear under **Associated Superannuation Funds > Related Account**.

Membership details

Details **Associations** Cancel Membership

We invite you to opt into a consolidated invoice for your authorised representatives. Licensees that choose to receive a consolidated invoice for their representatives receive a \$5 discount per ACR membership in the invoice. A consolidated payment allows you confidence in knowing your representatives are compliant and able to trade.

Consolidate Invoice
 No Yes
 Update

Associated ACR's
 Export Search Q Add

Related Account	Related Account No.	Start Date	End Date	Status
ACR Just Like That	1133	26/02/2024		Active
ACR No 4. Pty Ltd	1140	26/02/2024		Active
ACR n 5	1451	07/02/2024		Active

Associated Superannuation Funds

Search Q

Related Account	Related Account No.	Start Date	End Date	Status
dd	1413	18/01/2024		Active

Enter End Date
End Today

4. Click the **drop-down arrow** to either end the associated fund's relationship end date (today or future end date).

Update Superannuation Fund

Trustee Required
ABC Trustee

Superannuation Fund Required
dd

Account Relationship Required
Superannuation Fund

Start Date
18/01/2024

End Date
DD/MM/YYYY

Submit

5. Click **Submit**.

Once the end date has been reached, the status will change to inactive. If a date in the past has been entered, the status will change to inactive overnight.

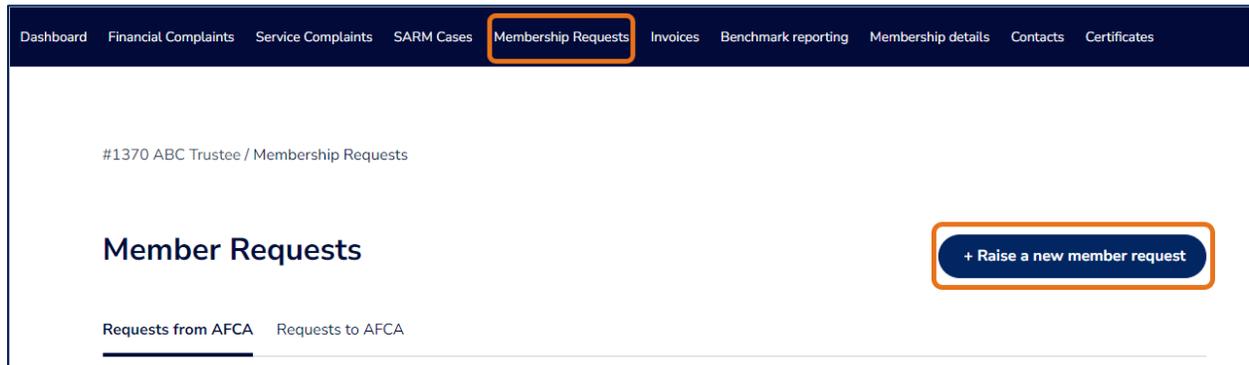
Alternatively, if you select **End Today**, the end date will automatically change to today's date and the status will change to inactive overnight.

Transferring superannuation fund association

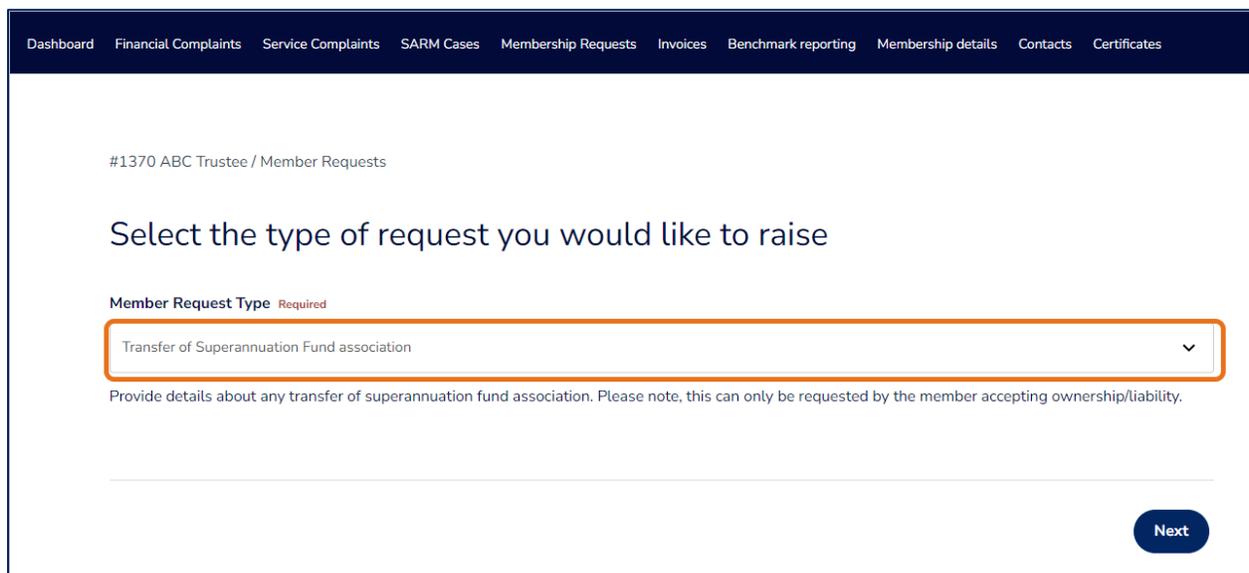
Administrator contacts of trustees are able to lodge a Superannuation Fund Transfer request, for funds that are being transferred to their Trustee membership. Please note, this can only be raised by the trustee account receiving the fund.

1. Log in to the portal and click on the **Membership Requests** tab.

2. Click **Raise a new member request**.



3. Selects **Transfer of Superannuation Fund association** and click **Next**.



4. Fill in the required fields and click **Submit**.

Transfer of Superannuation Fund association

Please enter the new super fund details: Required

Enter the date the transfer is effective from: Required

Are complaints being transferred? Required

No Yes

This is a regulated change, and requires legal documentation. For AFCA to facilitate these changes, please provide legal documentation outlining the Super Fund Transfer

Click the Upload a Document Button to add the super fund transfer(SFT) documentation

[Add Documents](#)

File Name	Created On ↓
There are no records to display.	

[Previous](#) [Submit](#) [Cancel](#)

Once you have submitted the request, it will then be added to our system ready to be actioned by a Membership Officer.