

Investment choice

Use this form to change how your account balance is invested, or how you draw your income payments, for your Transition to retirement (TTR) Income or Choice Income account. If you have a Choice Income account and you'd like to invest in the Member Direct investment option, you will need to apply through your online account at australiansuper.com/login

You can't use this form to change investments for your super account. Visit australiansuper.com/forms and select the Superannuation tab for the super accounts version of this form.



Please complete in pen using CAPITAL letters and print (X) to mark boxes. You must complete all sections and sign the form at Step 4. Read the Privacy Collection Statement on this form to see how AustralianSuper uses your personal information.

1 Your personal details

Last name

First name/s

Street address

Suburb

Telephone (business hours)

Telephone (after hours)

Mobile

Email

Member number

Account number*

Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Dr ☐

Date of birth

State

Postcode

* You must complete a separate form for each account you hold.

2 Change your investments and where you draw your payments from

Do you want to change how you invest your account?

- ☐ **Yes** – fill in Column A, showing the percentage you want to invest in each option
- ☐ **No** – go to the next question

Which investment option/s do you want your payments taken from?

You must choose (X) one of these options.

- ☐ **Option 1: Pro-rata** – take payments from each investment option in proportion to the balance in each option.
- ☐ **Option 2: Highest balance** – take payments from the investment option with the highest balance.
- ☐ **Option 3: Payment order** – take payments in the order I have chosen (to do this fill in column B, making sure you only order options that you've chosen to invest in and you have numbered all of your chosen investments)

You should consider the likely investment return, risk, and your investment timeframe when choosing an investment option. Returns are not guaranteed and may be positive or negative. Find out more by reading the *Choice Income Product Disclosure Statement* or *TTR Income Product Disclosure Statement* at australiansuper.com/RetirementGuide or australiansuper.com/TTRGuide



Investment option	Column A: % to invest in	Column B: Payment order (for Option 3 only)
PreMixed options		
High Growth	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>
Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>
Socially Aware	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>
Indexed Diversified	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>
Conservative Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>
Stable	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>
DIY Mix options		
Australian Shares	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>
International Shares	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>
Diversified Fixed Interest	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>
Cash	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>
TOTAL MUST ADD UP TO 100%	1 0 0 %	

See Step 3 on the next page to find out when your investment switch will be effective.



3 Effective date

Switch requests received before 4pm AEST/AEDT (Melbourne time) on a business day, are effective the next business day. Switch requests received on or after 4pm AEST/AEDT (Melbourne time) on a business day, or on a weekend or public holiday, will become effective after 2 business days. A business day is any day other than a weekend or public holiday (national and the Victorian Queen's Birthday holiday).

AEST and AEDT refer to Australian Eastern Standard Time and Australian Eastern Daylight Time as observed in Melbourne, Victoria, Australia. During daylight saving, the AEDT cut off time applies to all transactions. Find the relevant investment switch cut off times for your state or territory at australiansuper.com/investmentchange

Please allow between 2-3 business days for switches to show in your online account.

4 Declaration

Please complete all the sections on this form and sign below. We may not be able to process your application if you do not provide the information requested on this form.

By signing this form, I acknowledge that:

1. I have read the Privacy Collection Statement and I understand how AustralianSuper will use my personal information.
2. I have read the important information about investment options in the *TTR Income Product Disclosure Statement* or *Choice Income Product Disclosure Statement*. I understand that the information is general and does not constitute personal financial advice. I acknowledge that AustralianSuper has recommended that I seek financial advice should I require it before making an investment choice that is right for my needs and circumstances.
3. Investment choice requests must be made online at australiansuper.com or by completing this *Investment choice* form which is for TTR Income and Choice Income accounts only. To change how your super account is invested, you must use the Investment choice form for super accounts, available from australiansuper.com/forms under the Superannuation tab. Hard copy forms must be completed in full and signed by the member. Incomplete, incorrect or unsigned forms will not be processed. AustralianSuper does not accept responsibility for any financial loss incurred as a result of incomplete or unsigned forms.
4. With the PreMixed options, the AustralianSuper Trustee is responsible for appointing the investment managers and for setting the strategic asset allocation and objectives for each option.
5. With the DIY Mix options, the AustralianSuper Trustee is responsible for appointing the investment managers and for setting the strategic asset allocation and objectives for each option, but I am responsible for selecting a combination of the available investment options to build an investment strategy and objectives that are right for me.
6. I can switch all, or part, of my account balance to another investment option daily excluding weekends or public holidays (national and the Victorian Queen's Birthday holiday). If my request is received before 4pm AEST/AEDT (Melbourne time) on any business day, my account will be invested in my new investment choice/s the next business day and my new investment choice/s will show in my online account in two business days.
7. If I request a change to the payment order I understand this must be received before 4pm AEST/AEDT (Melbourne time) at least 5 business days before the next scheduled payment date.
8. If an *Investment choice* form and online choice request are received on the same business day the instructions contained in the online request will apply.
9. Once I've made an investment choice request, I understand that I can only cancel it through my online account before 4pm AEST/AEDT (Melbourne time) on the business day before my switch is effective.
10. Funds to cover investment choice changes are deducted pro-rata across my other investments to the value of the switch.
11. Investment returns (positive or negative) will be applied to all my investment choices whenever I change how my account balance is to be invested across the investment options.
12. There are no fees to make or change my PreMixed and DIY Mix investment option choices using this form.
13. I understand that changing investments prior to opening a Choice Income account may affect my potential Balance Booster. See the *Choice Income Product Disclosure Statement* or *TTR Income Product Disclosure Statement* for details.

Sign here



Date

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Privacy Collection Statement

Please read this Privacy Collection Statement to see how AustralianSuper uses your personal information.

AustralianSuper Pty Ltd (ABN 94 006 457 987) of Locked Bag 6, Carlton South, Victoria 3053, collects your personal information (PI) to operate your super account (including insurance), improve our products and services and keep you informed. If we can't collect your PI we may not be able to provide these services. PI is collected from you but sometimes from third parties. We will only share your PI where necessary to perform our activities with our administrator (Australian Administration Services Pty Ltd, being a part of MUFG Pension & Market Services Holdings Ltd), our contact centre provider (Concentrix Services Pty Ltd), service providers, as required by law or court/tribunal order, or with your permission. Your PI may be accessed overseas by some of our service providers. A list of countries can be found at the URL below. Our Privacy Policy details how to access and change your PI, as well as the privacy complaints process. For complete details go to australiansuper.com/privacy or call us on **1300 300 273**.

Please return this completed form to:

AustralianSuper, Locked Bag 6, CARLTON SOUTH VIC 3053

or upload a copy at australiansuper.com/upload-document

Questions? Call **1300 300 273** or visit australiansuper.com/retirement