Investment choice form – Accumulation 1, Accumulation 2, DBD Accumulation component and Spouse Account members

UniSuper

Using this form to make an investment choice

You can choose a single investment option or a mix of investment options based on your individual requirements.

Applications made on this *Investment choice form* only apply to the account nominated by you in Section 1. You must complete a separate *Investment choice form* if you wish to switch your investment options for any other UniSuper super or pension account(s) that you may have.

You can switch investment options on a weekly basis.

Understanding the risks

You should understand the risks and other implications of selecting and switching your investment options. Please read the latest *Investing for the future* booklet before completing this form. We recommend that you consult a licensed financial adviser before making any investment decisions.

Effective dates for investment option changes

UniSuper must receive your completed form by 5.00 pm (AEST) on a Tuesday to ensure that your investment instruction takes effect on that Friday. (If the Tuesday is a public holiday, the form must be received by 5.00 pm (AEST) the previous business day.)

A completed form received after 5.00 pm (AEST) on Tuesday will take effect on the Friday of the following week.

Once UniSuper receives your switching instruction, the instruction can only be withdrawn by providing a notice in writing to UniSuper (see contact details at the back of this form) before the applicable cut-off date and time, as outlined above.

Investment switching fee

The first switch per account in each financial year is free. All subsequent switches will be charged a $27* fee per switch.

**Note that fees are generally increased in line with inflation at 1 July each year.*

Further information

If you need further information:

- email **enquiry@unisuper.com.au** or
- call the UniSuper Helpline on **1800 331 685.**

Privacy information

UniSuper recognises the importance of protecting your personal information and is committed to complying with its privacy law obligations. UniSuper collects and manages various types of personal information about you to provide you with UniSuper membership and benefits. To find out more about how UniSuper collects and manages your personal information, please refer to UniSuper's Privacy Policy, which is available from UniSuper's website at www.unisuper.com.au or by calling the UniSuper Helpline on 1800 331 685 between 8.30 am and 5.30 pm (AEST) Monday to Friday.

SECTION 1 — Member details

Please fill in your member details

UniSuper member number
(If you are unsure of your member number, refer to your most recent UniSuper correspondence or call the UniSuper Helpline on 1800 331 685.)

Title: Mr ☐ Mrs ☐ Ms ☐ Dr ☐ Professor ☐

Other

Surname

Given names

Date of birth *(DD/MM/YYYY)*

D D M M Y Y Y Y

SECTION 2 — Make an investment choice

You can choose how your existing account balance, future contributions and rollovers are invested.

I would like to:

☐ Change the investment options for my existing account balance and also change my future contributions strategy.
Complete SECTIONS 3 and 4.

☐ Change the investment options for my existing account balance only. My future contributions strategy will not change.
Complete SECTION 3.

☐ Change my future contributions strategy only. The investment options for my existing account balance will remain unchanged.
Complete SECTION 4.

☐ Create a new rollover strategy that will apply to all future rollovers received.
Complete SECTION 5.

form continues →

Fund: UniSuper ABN 91 385 943 850
Trustee: UniSuper Limited ABN 54 006 027 121
Level 35, 385 Bourke Street, Melbourne VIC 3000
Administrator: UniSuper Management Pty Ltd ABN 91 006 961 799 AFSL 235907

UNISF00088 0412
Date: 21 April 2012

SECTION 3 — Change the investment options for my existing account balance

Please select the option or combination of options that you want to switch your existing account balance to. The total must equal 100% and each nomination must be in whole numbers.

PRE-MIXED	Capital Stable	%
	Conservative Balanced	%
	Balanced	%
	Socially Responsible Balanced	%
	Growth	%
	High Growth	%
SECTOR	Cash	%
	Australian Bond (formerly Australian Fixed Interest)	%
	Listed Property	%
	Australian Shares	%
	International Shares	%
	Socially Responsible High Growth	%
	Global Environmental Opportunities	%
	Australian Equity Income	%
	Global Companies in Asia	%
	TOTAL	1 0 0 %

Sector options are less diversified and are not intended to be used in isolation, but are intended to be combined with other investment options to build a diversified portfolio.

For example, the Australian Equity Income option might have exposure to as few as 20 entities, and Global Companies in Asia option as few as 40 entities compared to the Balanced option which has an exposure to over 1,500 entities.

If you choose to only invest in a Sector option, you may be exposed to more risk and may miss out on the benefits of the balance between risk and return offered by a Pre-Mixed option.

The first switch per account in each financial year is free. All subsequent switches will be charged a $27 fee per switch.

This switch will not apply to your future contributions. To change the investment options for your future contributions, complete Section 4.

SECTION 4 — Change my future contributions strategy

Please select the option or combination of options in which you wish to invest your future contributions. The total must equal 100% and each nomination must be in whole numbers.

PRE-MIXED	Capital Stable	%
	Conservative Balanced	%
	Balanced	%
	Socially Responsible Balanced	%
	Growth	%
	High Growth	%
SECTOR	Cash	%
	Australian Bond (formerly Australian Fixed Interest)	%
	Listed Property	%
	Australian Shares	%
	International Shares	%
	Socially Responsible High Growth	%
	Global Environmental Opportunities	%
	Australian Equity Income	%
	Global Companies in Asia	%
	TOTAL	1 0 0 %

Sector options are less diversified and are not intended to be used in isolation, but are intended to be combined with other investment options to build a diversified portfolio.

For example, the Australian Equity Income option might have exposure to as few as 20 entities, and Global Companies in Asia option as few as 40 entities compared to the Balanced option which has an exposure to over 1,500 entities.

If you choose to only invest in a Sector option, you may be exposed to more risk and may miss out on the benefits of the balance between risk and return offered by a Pre-Mixed option.

Your chosen future contributions strategy will apply to contributions received from the date this request is processed by UniSuper.

This investment strategy will not apply to your existing account balance. To change the investment options for your existing account balance, complete Section 3.

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SECTION 5 — Change my rollover strategy

Please select the option or combination of options in which you wish to invest all rollovers to your account. The total must equal 100% and each nomination must be in whole numbers.

PRE-MIXED	Capital Stable	%
	Conservative Balanced	%
	Balanced	%
	Socially Responsible Balanced	%
	Growth	%
	High Growth	%
SECTOR	Cash	%
	Australian Bond (formerly Australian Fixed Interest)	%
	Listed Property	%
	Australian Shares	%
	International Shares	%
	Socially Responsible High Growth	%
	Global Environmental Opportunities	%
	Australian Equity Income	%
	Global Companies in Asia	%
	TOTAL	1 0 0 %

Sector options are less diversified and are not intended to be used in isolation, but are intended to be combined with other investment options to build a diversified portfolio.

For example, the Australian Equity Income option might have exposure to as few as 20 entities, and Global Companies in Asia option as few as 40 entities compared to the Balanced option which has an exposure to over 1,500 entities.

If you choose to only invest in a Sector option, you may be exposed to more risk and may miss out on the benefits of the balance between risk and return offered by a Pre-Mixed option.

From the date it is processed by UniSuper, your rollover strategy will apply to all future rollovers to your account, unless you change your rollover strategy.

This selection does not affect how future contributions or your existing account balance are invested.

SECTION 6 — Member declaration and signature

Please read this declaration before you sign and date your form.

- I declare the information I have given on this form is true and correct.
- I direct UniSuper to invest my account in the investment option(s) I have selected and accept responsibility for my selection.
- I acknowledge that I have read and understood the information in the *Investing for the future* booklet and I understand that:
  - Investing in an investment option involves some risk and on occasions my account balance may decrease.
  - UniSuper does not guarantee my investment or any particular rate of return.
  - The first switch per financial year is free. Subsequent switches incur a fee of $27.
- I understand that, once UniSuper receives a switching instruction, it will take effect and that it can only be withdrawn by providing notice in writing to UniSuper before the applicable cut-off date and time outlined on this form.
- I understand that if this *Investment choice form* is incorrectly completed or unsigned, it will be returned to me.
- I understand that if I invest in more than one investment option, my account will not be automatically rebalanced.
- I understand that by changing my future contributions strategy will only affect my future contributions and will not change my existing investments.
- I acknowledge and consent to my personal information being used in accordance with UniSuper's Privacy Policy.

Signature

X

Date *(DD/MM/YYYY)*

D D M M Y Y Y Y

Return your form:

by mail to:
UniSuper, Level 35, 385 Bourke Street, Melbourne VIC 3000

or by facsimile to:
03 9910 6141 (remember to send both sides of this form)

Email or telephone instructions cannot be accepted.

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