

Investment choice form – pension members



AVOID PROCESSING DELAYS

Check you're using the latest version of this form. Compare the issue date at the bottom of this page with the version available at unisuper.com.au/forms.



SAVE TIME, GO ONLINE!

The quickest way to make an investment switch is by logging in to your account at unisuper.com.au.

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

Understanding the risks

You should understand the risks and other implications of selecting and switching your investment options. Please read the latest *How we invest your money* booklet before completing this form. We recommend that you consult a qualified financial adviser before making any investment decisions.

Privacy statement

We recognise the importance of protecting your personal information and are committed to complying with our privacy law obligations.

We collect your personal information to administer your account, ensure you're eligible for insurance cover, provide you with UniSuper membership benefits, services and products, verify your identity and improve our products and services. You consent to our collecting sensitive information about you, where collecting that information is reasonably necessary for us to perform one or more of our functions or activities. We usually collect personal and sensitive information directly from you, however, it may also be collected from third parties, such as your employer.

We may also collect this information from you because we're required or authorised by or under an Australian law or a court/tribunal order to collect that information. If you don't provide this information, we may not be able to administer your account, provide you with a product or service or you may be disadvantaged in some other way.

We may disclose your information to any service provider we engage (for example mail-houses, auditors, insurers, actuaries, lawyers and research consultants) to carry out or help us provide your membership benefits, services and products. This includes overseas entities. The countries we may disclose personal information to are Japan, Canada and the United States of America. Where information is transferred overseas, we'll seek to ensure the recipient of the data has security systems to prevent misuse, loss or unauthorised disclosure in line with Australian laws and standards.

SECTION 1 — Your details

 Please use **BLACK** or **BLUE BALLPOINT PEN** and print in **CAPITAL LETTERS**. Cross where required **X**

UniSuper pension number

If you're unsure, call us on **1800 331 685**.

Title Mr Mrs Ms Dr Professor

Other

Surname

Given name

Date of birth (DDMMYYYY)

Which account does this form apply to? (Select one box only)

> Flexi Pension

> Term Allocated Pension

Our Privacy Policy contains information about how you can access any personal information we hold, how to correct your information and how to make a complaint about a breach of the Privacy Act. It's available at unisuper.com.au or by calling us on **1800 331 685**.

Effective dates for investment option changes

Online switches are quicker because we consider them 'received' as soon as they're submitted.

If you submit your switch via this form – whether by post, email or a financial adviser – we consider it received once it's been entered into our administration system (rather than when you email it or it's been delivered to us by post).

If we receive your switch before 2pm on a Melbourne working day, it will take effect two working days later. If we receive your switch after 2pm, it will take effect three working days later.

For more information refer to *How we invest your money*, available at unisuper.com.au.

Switching fee

The first switch per account in each financial year is free. All subsequent switches will be charged a \$9.85 fee per switch.

form continues >



SECTION 2 — Investment option choice

You can choose a single investment option or a mix of investment options based on your individual requirements. The total must equal 100% and each nomination must be in whole numbers.

PRE-MIXED	Conservative	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%		
	Conservative Balanced	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%		
	Balanced	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%		
	Sustainable Balanced	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%		
	Growth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%		
	High Growth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%		
	Sustainable High Growth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%		
SECTOR	Cash	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%		
	Australian Bond	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%		
	Diversified Credit Income	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%		
	Listed Property	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%		
	Australian Shares	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%		
	International Shares	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%		
	Global Environmental Opportunities	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%		
	Australian Equity Income	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%		
	Global Companies in Asia	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	%		
TOTAL					1	0	0	%

Sector options are less diversified and aren't intended to be used in isolation. They're 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.



NEED HELP?

For more information:

- email enquiry@unisuper.com.au, or
- call 1800 331 685.

SECTION 3 — Member declaration and signature

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

- I declare the information I've given on this form is true and correct.
- I direct UniSuper to invest my account in the investment option(s) I've selected and accept responsibility for my selection.
- I acknowledge that I've read and understood the information in the *How we invest your money* booklet and I understand that:
 - investing in an investment option involves some risk and on occasion my account balance may decrease.
 - UniSuper doesn't guarantee my investment or any particular rate of return.
 - the first switch per financial year is free. Subsequent switches incur a fee of \$9.85 per switch.
- I acknowledge that I've read and understood the information in the 'Effective dates for investment option changes' section of this form.
- I understand that, once UniSuper receives this switching instruction, it can't be cancelled or amended.
- 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 won't be automatically rebalanced.
- I acknowledge and consent to my personal information being used in accordance with UniSuper's Privacy Policy.

Signature

Date (DDMMYYYY)

The form must be received by UniSuper within 30 days of it being signed.



RETURN YOUR FORM:

- Email to enquiry@unisuper.com.au
- Mail to UniSuper, Level 1, 385 Bourke St, Melbourne Vic 3000