

Investment choice form – pension members



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 you consult a licensed financial adviser before making any investment decisions.

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 we receive it by post).

If we receive your switch before 2pm on a Melbourne business day, it will take effect from the close of business* on the next business day. If we receive your switch after 2pm, it will take effect from the close of business* two Melbourne business days later.

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

* For the purposes of this section, close of business is the close of regular trading hours for global security exchanges for that trading day. For example, for equities traded on the Australian Securities Exchange (ASX), this is 4.00pm Sydney and for equities traded on the New York Stock Exchange (NYSE), this is 4.00pm New York.

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.

PRIVACY STATEMENT

UniSuper is committed to protecting your personal information in accordance with privacy law obligations. The information that you provide to UniSuper on this form is collected and used in accordance with our Privacy Policy which can be found online at unisuper.com.au/privacy. If you have any privacy related questions, please call **1800 331 685**.

Target Market Determination

A Target Market Determination (TMD) for Flexi Pension is available at unisuper.com.au/pds. You can read about the type of member this product has been designed for in the TMD.

SECTION 1 YOUR DETAILS

▶ Please complete in BLACK or BLUE BALL POINT PEN using CAPITAL letters. Cross (X) where required.

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 (DD/MM/YYYY)

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

Flexi Pension Term Allocated Pension



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.

<i>Pre-Mixed</i>	Conservative		%
	Conservative Balanced		%
	Balanced		%
	Sustainable Balanced		%
	Growth		%
	High Growth		%
	Sustainable High Growth		%
<i>Sector</i>	Cash		%
	Australian Bond		%
	Diversified Credit Income		%
	Listed Property		%
	Australian Shares		%
	International Shares		%
	Global Environmental Opportunities		%
	Australian Equity Income		%
	Global Companies in Asia		%
	Total	100	%

About sector options

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 30 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.

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 if I have a Flexi Pension, I can read about the type of member for whom the product has been designed in the Target Market Determination available at [unisuper.com.au/pds](https://www.unisuper.com.au/pds).
- 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

<input type="text"/>	<input type="text"/>	<input type="text"/>
<small>DD</small>	<small>MM</small>	<small>YYYY</small>

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

Need help?

For more information:

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

Return your form:

- email to enquiry@unisuper.com.au
- mail to UniSuper, Level 1, 385 Bourke Street, Melbourne VIC 3000

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