

Investment choice form – super members

(Accumulation 1, Accumulation 2, DBD Accumulation component and Personal Account 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 requirements.

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.

MySuper

Accumulation 1, Accumulation 2 and Personal Account members with any part of their account invested in our Balanced option will automatically become part of MySuper. For more information, visit unisuper.com.au/mysuper.

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 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 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.

Changes to your future contribution or rollover strategy are effective from when they are received.

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.

Privacy information

We recognise the importance of protecting your personal information and are committed to complying with our privacy law obligations. For more information on how we collect and manage your information refer to the *Privacy statement* at the end of this form.

SECTION 1 — Your details

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

UniSuper member number

If you're unsure, refer to your most recent UniSuper correspondence or call us on **1800 331 685**.

Title Mr Mrs Ms Dr Professor

Other

Surname

Given name

Date of birth (DDMMYYYY)

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 won't change. Complete SECTION 3.
- change my future contributions strategy only. The investment options for my existing account balance won't change. Complete SECTION 4.
- create a new rollover strategy that will apply to all future rollovers received. Complete SECTION 5.

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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	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	%

* *Balanced is the MySuper option for all non-DBD members.*
This switch **won't** 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 want to invest your future contributions. 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

* *Balanced is the MySuper option for all non-DBD members.*
Your chosen future contributions strategy will apply to contributions received from the date we process this request. This investment strategy **won't** apply to your existing account balance. To change the investment options for your existing account balance, complete SECTION 3.



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 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.

SECTION 5 — Change my rollover strategy

Please select the option or combination of options in which you want to invest all rollovers to your account. 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* (MySuper)	<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	%

* *Balanced* is the MySuper option for all non-DBD members.

Please read the important information about Sector options on page 2 before making your nomination(s).

From the date we process this form your rollover strategy will apply to all future rollovers to your account, unless you change your rollover strategy.

This selection **doesn't** affect how future contributions or your existing account balance are invested.

You'll need to complete SECTION 3 or 4 of this form to make changes to your existing balance or future contribution strategy.

SECTION 6 — 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 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 \$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 understand that changing my future contributions strategy will only affect my future contributions and won't change my existing investments.
- I acknowledge that if I have an Accumulation 1, Accumulation 2 or Personal Account, any direction to the Trustee to switch all or part of my account invested in the Balanced investment option (UniSuper's MySuper offering) represents my consent to replace my investment in UniSuper's MySuper offering with another investment option offered through UniSuper.
- 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.

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RETURN YOUR FORM:

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



NEED HELP?

For more information:

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

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.

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](https://www.unisuper.com.au) or by calling us on **1800 331 685**.