

# Investment choice form – super members



## Save time, go online!

The quickest way to make an investment switch is by logging in to your account at [unisuper.com.au](https://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. For DBD members, the instructions on this form only apply to your accumulation component.

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](https://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 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).

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](https://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 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](https://unisuper.com.au/privacy). If you have any privacy related questions, please call **1800 331 685**.

## SECTION 1 YOUR DETAILS

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

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 (DD/MM/YYYY)

<input type="text"/>	<input type="text"/>	<input type="text"/>
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## 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.

## SECTION 3 CHANGE 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.

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

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

\* 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 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.

### Target Market Determination

A Target Market Determination (TMD) for Accumulation 1, Accumulation 2 and Personal Account is available at [unisuper.com.au/pds](https://www.unisuper.com.au/pds). You can read about the type of member each of these products have been designed for in the relevant TMD.

## 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		%
	Conservative Balanced		%
	Balanced* (MySuper)		%
	Sustainable Balanced		%
	Growth		%
	High Growth		%
	Sustainable High Growth		%
Sector	Cash		%
	Australian Bond		%
	Diversified Credit Income		%
	Listed Property		%
	Australian Shares		%
	International Shares		%
	Global Environmental Opportunities		%
	Australian Equity Income		%
	Global Companies in Asia		%
	<b>Total</b>	<b>100</b>	<b>%</b>

\* 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 if I have an Accumulation 1, Accumulation 2 or Personal Account, I can read about the type of member for whom the product has been designed in the relevant Target Market Determination available at [unisuper.com.au/pds](https://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 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 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

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

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

### Need help?

For more information:

- email [enquiry@unisuper.com.au](mailto:enquiry@unisuper.com.au), or
- call **1800 331 685**.

### Return your form:

- email to [enquiry@unisuper.com.au](mailto:enquiry@unisuper.com.au)
- mail to UniSuper, Level 1, 385 Bourke Street, Melbourne VIC 3000

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