

# Pension investment choice

Sunsuper Pty Ltd ABN: 88 010 720 840 AFSL No. 228975 Trustee of the Superannuation Fund ABN 98 50 313 7921  
 Important: Please provide us with as much information as possible.  
 Use **BLOCK** letters and black ink when completing this form and ensure it is signed and dated.

Member number  
 if already a member

## 1 Member details

Title (eg: Ms, Dr, etc)  Given names

Last name

Date of birth (dd/mm/yyyy)    Gender Male  Female

Street address / PO Box

Suburb / Town

State  Postcode

Contact phone  Alternate phone

Email address

## Making an investment choice

Choosing the investment options your pension is invested in could help you make the most of your money. You can choose to invest your account balance in up to 10 different investment options.

Read the Sunsuper Pension Options *Member guide* carefully and call us if there are any additional details or explanation you need.

Use Section 2 of this form to choose what options you would like to invest your account balance in. Use Section 3 of this form to choose what options you would like your pension payments to be taken from.

**The total of your percentage allocation(s) must add up to 100%.**

## 2 Your investment choice

I wish to change my investment choice for my:  Retirement pension **OR**  Workforce pension

Please select how you would like to invest your account balance:

Complete the Investment details section below to choose up to 10 options that you would like to invest your account balance in. **Your investment choice must add up to 100%.**

Investment option	Percentage (%)	FOR OFFICE USE ONLY
Growth	.00%	RB
Balanced	.00%	RC
Retirement	.00%	RA
Conservative	.00%	RD
Balanced – Index	.00%	RN
Shares	.00%	RP
Australian Shares	.00%	RG
Australian Shares – Index	.00%	RH
International Shares (hedged)	.00%	RI
International Shares (unhedged)	.00%	RQ
International Shares – enhanced Index (hedged)	.00%	RJ
International Shares – enhanced Index (unhedged)	.00%	RR
Emerging Markets Shares	.00%	RT
Property	.00%	RL
Australian Property – Index	.00%	RK
Fixed Interest	.00%	RO
Fixed Interest – Index	.00%	RF
Cash	.00%	RE
Ethical, Environmental and Socially Responsible investments	.00%	RS
Capital Guaranteed	.00%	RM

**Must be whole numbers and add to TOTAL 100%**

Would you like to rebalance your investments automatically?

- Yes – rebalance twice a year on 31 March and 30 September each year
- Yes – rebalance annually on 31 March each year
- No

Refer to the Sunsuper *Pension Options Member guide* for more information on rebalancing.

## 3 Pension payment source

**(This section refers to where your pension will be drawn from)**

Complete this section to show which Investment options you would like your Pension to be paid from. Please refer to the Sunsuper Pension Options *Member guide* for more information on receiving payments.

**I wish to have my payments taken**

Proportionally across my account balance at time of payment (default).

**OR**

From the following one of my investment options:

until there is no longer enough funds to make your regular payments than proportionally across my account balance.

NOTE: You may only nominate one investment option. If there are not enough funds in your nominated investment option to make a future pension payment, the payment will be made proportionally from your remaining investment options.

## 4 Declaration

- I have received and read the Sunsuper Pension Options *Member guide*.
- I understand that I may not have been notified about any material adverse changes or significant events that adversely affects information in the *Member guide* immediately before the change or event occurs.

Note – Sunsuper will let you know as soon as possible if there are any material adverse changes or significant events affecting your membership of Sunsuper.

- You can get the most up-to-date information at any time from our website at [sunsuper.com.au](http://sunsuper.com.au) or by calling us on 13 11 84.
- My changes will be effective from the date Sunsuper receives this form, up to 3:00pm Brisbane time. Forms received after that time will be effective from the next business day. If this form is not fully completed Sunsuper will not be able to process my request, and will contact me to complete another *Pension investment choice* form.

Member to sign here

Date (dd/mm/yyyy)\*