

# Investment choice

For adviser use only

**Important:** Please make sure all questions are answered. If all questions are not answered, the request may be delayed as the form may be returned. Please tick boxes where appropriate. Use **BLOCK** letters and dark ink when completing this form and ensure it is signed and dated by the member. \*DENOTES MANDATORY FIELD.



13 11 84 | sunsuper.com.au  
Reply Paid 2924 Brisbane Qld 4001

Member number

## 1 Personal details

Title	First name*	Middle name		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
Last name*	Date of birth (DD/MM/YYYY)*	Gender*		
<input type="text"/>	<input type="text"/>	<input type="text" value="M"/> <input type="text" value="F"/>		
Street Address/PO Box*				
<input type="text"/>				
Suburb/Town*	State*	Postcode*	Home phone number	Daytime phone number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Personal email address			Mobile phone number	
<input type="text"/>			<input type="text"/>	

Note: Unless the member has elected to receive printed information, Sunsuper will confirm this change electronically if we can. We'll email or SMS if there is information to view in *Member Online*. Preferences can be changed in *Member Online* or by calling us on 13 11 84.

## 2 Select how the investment choice is applied

**2A** Please select an option below. If no option is selected the investment choice will be applied to all accounts under this member number.

This investment choice is to be applied to all accounts under this member number

OR

Apply this investment choice to the following accounts:  
(tick all that apply)

- |   |  |
|---|--|
| <input type="checkbox"/> Sunsuper for life Super-savings account          | <input type="checkbox"/> Sunsuper for life Corporate Super-savings account |
| <input type="checkbox"/> Sunsuper for life Business Super-savings account | <input type="checkbox"/> Income account                                    |

Please contact us if you are unsure which type of account the member holds.

**2B** Please select an option below. If no option is selected the investment choice will apply to both the existing account balance and any new money coming into the account.

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Change both the existing account balance and any new money coming into this account | <input type="checkbox"/> Change the existing account balance only | <input type="checkbox"/> Change any new money coming into this account only |
|--|---|---|

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### 3 Investment allocations You can choose up to 10 investment options at any one time

Investment option	Percentage (%)	FOR OFFICE USE ONLY	Investment option continued	Percentage (%)	FOR OFFICE USE ONLY
Lifecycle Investment Strategy <small>Note: Super-savings accounts only</small>	.00%	SB/SR/SC	Australian Shares - Index	.00%	44/RH/WH
Growth	.00%	11/RB/WB	International Shares - Index (hedged)	.00%	31/RJ/WJ
Balanced	.00%	BF/RC/WC	International Shares - Index (unhedged)	.00%	32/RR/WR
Balanced – Index	.00%	13/RN/WN	Emerging Markets Shares	.00%	47/RT/WT
Socially Conscious Balanced	.00%	17/RS/WS	Property	.00%	46/RL/WL
Diversified Alternatives	.00%	48/RW/WW	Australian Property - Index	.00%	33/RK/WK
Retirement	.00%	10/RA/WA	Diversified Bonds	.00%	12/RO/WO
Conservative	.00%	35/RD/WD	Diversified Bonds – Index	.00%	23/RF/WF
Shares	.00%	39/RP/WP	Cash	.00%	38/RE/WE
Australian Shares	.00%	37/RG/WG	Capital Guaranteed	.00%	CG/RM/WM
			Must be whole numbers and add to TOTAL 100%		100.00%

### 4 Income accounts only

As well as changing investment options, this form can also be used to change the options that income payments are made from, or select auto rebalancing.

#### 4A I wish to have my payments taken:

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

OR

From the following of my investment options:  
until there are no longer enough funds to make your regular payments, then proportionally across my account balance.

Investment option	Percentage (%)	FOR OFFICE USE ONLY	Investment option continued	Percentage (%)	FOR OFFICE USE ONLY
Growth	.00%	RB/WB	Australian Shares - Index	.00%	RH/WH
Balanced	.00%	RC/WC	International Shares - Index (hedged)	.00%	RJ/WI
Balanced - Index	.00%	RN/WN	International Shares - Index (unhedged)	.00%	RR/WQ
Socially Conscious Balanced	.00%	RS/WS	Emerging Markets Shares	.00%	RT/WT
Diversified Alternatives	.00%	RW/WW	Property	.00%	RL/WL
Retirement	.00%	RA/WA	Australian Property - Index	.00%	RK/WK
Conservative	.00%	RD/WD	Diversified Bonds	.00%	RO/WO
Shares	.00%	RP/WP	Diversified Bonds - Index	.00%	RF/WF
Australian Shares	.00%	RG/WG	Cash	.00%	RE/WE
			Capital Guaranteed	.00%	RM/WM
			Must be whole numbers and add to TOTAL 100%		100.00%

**Please note:** If there are not enough funds in your nominated investment option(s) to make a future income payment, the payment will be made proportionally from your remaining account balance.

#### 4B I would like to rebalance my investments automatically:

NO OR  YES  Rebalance twice a year, effective 31 March<sup>1</sup> and 30 September<sup>1</sup> each year OR  Rebalance annually, effective 31 March<sup>1</sup> each year

**Please note:** Rebalancing is only available if there is more than one investment option chosen. Rebalancing simply means bringing the weighting of each investment option in the portfolio back into line with the original selection by moving money from one option to another. The weighting of investment options gets out of line when some investments perform better than others. Sunsuper offers an automatic rebalancing service that reweights investment options back into line with the original selection.

<sup>1</sup> Or if the rebalance date happens to fall on a non-business day, your rebalance will be processed using the unit price for the next business day.

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## 5 Financial adviser

- I have attached (or previously provided) a signed third party authority for my financial adviser to access information about my Sunsuper account/s. Please communicate with my financial adviser where possible regarding requirements of this form.

Name of financial adviser

## 6 Authorisation and declaration To be completed by the member

Your changes will be effective from the date we receive this form, if the form is received by 3.00pm AEST on a business day. Forms received after that time will be effective from the next business day.

If this form is not fully completed in accordance with our instructions (including if you nominate more than 10 options or select the Lifecycle Investment Strategy for an *Income account*) we will not be able to process your request, but we will contact you to complete another *Investment choice* form.

### Declaration

#### I declare that:

I have received and read the *Sunsuper for life Investment guide* and, if I have an *Income account*, the *Sunsuper for life* guide. I understand that when adding to my super in future, I may not have:

- the most recent *Product Disclosure Statement (PDS)*
- been notified about any material adverse changes or significant events that adversely affects information in the *PDS* 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 by visiting [sunsuper.com.au](http://sunsuper.com.au) or by calling us on 13 11 84.


If you are under 18 years of age, please call us on 13 11 84 before completing this form.

Please ensure you have completed the information on the front page and read the authorisation and declaration information before signing.

Please print your full name here\*

Member to sign here\*

Date (DD/MM/YYYY)\*

 Please return the form to Sunsuper  
Reply Paid 2924 Brisbane Qld 4001

We are committed to respecting the privacy of personal information you give us. If you would like a copy of Sunsuper's Privacy Policy, visit [sunsuper.com.au/privacy](http://sunsuper.com.au/privacy) or call 13 11 84.

Sunsuper Pty Ltd ABN 88 010 720 840 AFSL No. 228975 Trustee of the Sunsuper Superannuation Fund ABN 98 503 137 921 MySuper Authorisation 98 503 137 921 996