

# Change in investment options - Retirement Solutions

Complete this form in pen using CAPITAL letters. Where applicable complete boxes with an **X**

## SECTION 1 - YOUR PERSONAL DETAILS

Client number

Last name

Mr

☐

Mrs

☐

Miss

☐

Ms

☐

Dr

☐

First name/s

Male

☐

Female

☐

Date of birth (DD/MM/YYYY)

Postal address

Suburb/town

State

Postcode

Street address (if different to postal address)

Suburb/town

State

Postcode

Home phone

Day time phone

Mobile

Email

## SECTION 2 - CHANGE IN INVESTMENT OPTIONS

### (a) Account balance

Investment strategy for my existing account balance.

Investment Option	Percentage	Whole numbers only
Diversified High Growth	<input type="text"/> <input type="text"/> <input type="text"/> %	
Diversified Moderate (Default)	<input type="text"/> <input type="text"/> <input type="text"/> %	
Diversified Conservative	<input type="text"/> <input type="text"/> <input type="text"/> %	
Australian Shares	<input type="text"/> <input type="text"/> <input type="text"/> %	
Global Shares	<input type="text"/> <input type="text"/> <input type="text"/> %	
Sustainable Future	<input type="text"/> <input type="text"/> <input type="text"/> %	
Property & Infrastructure	<input type="text"/> <input type="text"/> <input type="text"/> %	
Bonds	<input type="text"/> <input type="text"/> <input type="text"/> %	
Cash	<input type="text"/> <input type="text"/> <input type="text"/> %	
<b>Must total</b>	<b>1 0 0 %</b>	

### (b) Pension payments

Investment strategy for my future pension payments.

Investment Option	Percentage	Payment order	Whole numbers only
Diversified High Growth	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>	
Diversified Moderate (Default)	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>	
Diversified Conservative	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>	
Australian Shares	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>	
Global Shares	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>	
Sustainable Future	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>	
Property & Infrastructure	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>	
Bonds	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>	
Cash	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="checkbox"/>	
<b>Must total</b>	<b>1 0 0 %</b>		

If you do not complete part (b) then your pension payments will default from your investment options selected in part (a).  
Your investment options can also be changed by accessing your online member account at [wasuper.com.au](http://wasuper.com.au).

## SECTION 3 - EFFECTIVE DATE OF INVESTMENT SWITCH

Switches will be effective from the latter of the:

- a) date nominated by me below; or  
b) business day following receipt of this form by WA Super.

a) Do you wish to nominate an effective date for your switch? (WA business days only)

☐ Yes, effective date is: 
☐ No (go to question b)

b) Do you have multiple income stream accounts?

☐ Yes (go to question c)

☐ No (go to section 4)

c) Do you want your investment switch to apply to ALL your income stream accounts?

☐ Yes (go to section 4)

☐ No, only account number:



### SECTION 3 - EFFECTIVE DATE OF INVESTMENT SWITCH CONTINUED

If we receive your request to change your investment option/s at 4.59pm AWST, or earlier, on a business day, your request will be effective the next business day. If we receive your request at or after 5pm AWST on a business day, or on a weekend, or, on a national or WA public holiday, your request will take an extra business day.

### SECTION 4 - YOUR PRIVACY

Your privacy is important to us. Details on how your personal information is collected, managed and used is contained in our Privacy Policy which includes our Privacy Collection Statement and is available at [www.wasuper.com.au/privacy/](http://www.wasuper.com.au/privacy/).

### SECTION 5 - ACKNOWLEDGEMENT AND DECLARATION

- I understand that, by completing and signing this form, any previous investment options will be replaced by the new details.
- I understand that, the benefits of the Fund are not guaranteed, the value of investments may rise and fall and, I may not get back the amount originally invested. I further acknowledge that the Trustee has not made specific recommendations concerning membership or investments.
- I acknowledge that, if I am uncertain as to the most appropriate investment strategy for my personal needs, I should seek professional financial advice from a licensed financial adviser before deciding upon my investment option(s).
- I acknowledge that, should a lump sum withdrawal of monies be requested within 60 days of receipt of this change in investment options form, an interim crediting rate may be used to determine the earnings allocated to my account.
- I understand that the pension payment strategy nominated by me in section 2 (b) may not be applied until the following month if my request is effective between the 10th and 15th of the month.
- Investment change requests must be made online or by completing this form. Incomplete or unsigned forms can't be processed. Hard copy forms must be completed and signed by the member. WA Super doesn't accept responsibility for any financial loss incurred as a result of an incomplete or unsigned form.
- If a Change in investment option form and an online switch request are received on the same business day, the instructions contained in the online request will apply.
- I have read and understood this form, in conjunction with WA Super - Retirement Solutions Product Disclosure Statement. In signing this form I acknowledge that I will continue to be bound by the Fund's Trust Deed and Rules in all respects.

**Signature**

**Date**