

Executive Super

Changes of Investment Choice Form

For assistance & enquiries: **Ph 132 467**Please send this completed form to: **Intrust Super, GPO Box 1416, Brisbane QLD 4001**

Please write in BLOCK letters and use a BLUE or BLACK pen. This request will be invalid if unsigned or undated.

Complete this form if you would like to change the way your funds are invested. You can change [switch] your investment option for free at any time. A confirmation of your investment switch will be sent to you within 7 days. Please check the confirmation to ensure it reflects your instructions.

For more information please refer to the Executive Super Other important Information: Investments booklet before making your selection. The booklet outlines each of the investment options, including objectives and risk profiles. The booklet and recent investment information are available on our website: www.intrust.com.au.

Section 1: Member Details [Please complete in full]

Member Number

Date of Birth (DDMMYYYY)

Mr/Mrs/Ms/Miss Surname

Given Names

Email

POSTAL ADDRESS

Unit/house/PO Box number

Street name

Suburb/Town

State

Post code

Section 2: Investment choice for current balance

Please specify how you would like your **current** balance invested. Your total investment allocation for your current account balance must be in whole numbers and add up to 100%.

Switch my current balance to:

- % Stable
- % Conservative
- % Balanced
- % Growth
- % Combined shares
- % Cash
- % Bonds [fixed interest]
- % Property
- % Australian shares
- % International shares

100% Total

Section 3: Investment choice for future contribution

Please specify how you would like all **future** contributions invested. Your total investment allocation for your future contributions must be in whole numbers and add up to 100%.

- I would like all my future contributions invested as specified in Section 2.

OR

- I would like all my future contributions invested as follows:

Apply my future transactions to:

- % Stable
- % Conservative
- % Balanced
- % Growth
- % Combined shares
- % Cash
- % Bonds [fixed interest]
- % Property
- % Australian shares
- % International shares

100% Total

Please turnover to complete and sign this form ▶

Changes to investment choices are processed on a daily basis (excluding weekends and national public holidays).

Once we receive your request in writing, we will process the change. If the change is processed prior to 4 pm (Sydney time), your super will be invested in your new option(s) the following business day. Please note that it will take two business days after the investment change is processed for this to be reflected on your online account.

Section 4: Declaration and Disclaimer

Please direct my current account balance and all future transactions made by me and/or on my behalf to the investment choice option[s] that I have nominated on this form.

I declare that:

- I have received, read and understood all of the information that I reasonably require, in order to make an informed decision about my investment options and how to complete this form. Intrust Super's privacy statement, Financial Services Guide and Product Disclosure Statement[s] are all readily available from www.Intrust.com.au and I can contact Intrust Super at any time, if I require assistance.
- I understand that any information provided by Intrust Super is of a general or factual nature only. The information does not take into account my personal investment objectives, financial situation or particular needs. I acknowledge that Intrust Super has recommended that I seek professional financial advice before making any investment decision.
- I understand and accept that investment carries risk; that the return on my investment may be positive or negative and that switching investments may incur fees, as detailed in the Product Disclosure Statement.
- It is my intention that the Trustee act upon my instructions contained in this form as soon as practicable and that these instructions will supersede all previous investment elections.
- I understand my investment switch will occur in accordance with the guidelines outlined in the current Product Disclosure Statement [PDS].
- I understand that once I make an investment choice, it cannot be reversed. A further switch can be lodged which will take effect on the relevant date for that particular switch.
- It is my responsibility to ensure that my investment instructions have been processed and invested in accordance with my instruction. If this does not occur, I must notify Intrust Super of any failure to action my request or of any error in processing my investment switch instructions. If I fail to notify Intrust Super within 1 month of the submitting this form, I waive my right to later complain. Neither Intrust Super nor the Administrator will accept any liability for failure to comply with this condition.
- Neither the Trustee nor its Administrator accept any liability for any loss, howsoever incurred as a result of acting upon my instructions in this form.

Signature of Applicant



Date [DDMMYYYY]

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