

CHANGE OF INVESTMENT CHOICE FORM



INCOME STREAM/MARKET LINKED PENSION

Investment switching is free if you make your switch online through your Member Portal account. Visit energysuper.com.au/login to access your account or to register. Or, if you prefer, you can complete all sections of this form and return it to Energy Super.

The instructions you provide on this form will replace any previous instructions you have given Energy Super and once submitted cannot be revoked.

Please note: All switches are generally processed using the unit price struck for the day in which your completed request is received. The Trustee has performance standards in place for the processing of investment switches. Generally investment switch requests will be processed within a few days of receipt. Once you submit your investment switch request, it cannot be revoked. The Trustee reserves the right to limit the number of switches a member can make if they are deemed to be switching excessively and may defer the processing of transactions to maintain the equity of the Fund.

Please complete the form in BLOCK letters using blue or black pen. Print an 'X' to mark boxes where appropriate.

YOUR PERSONAL DETAILS

Energy Super member number (if known):

Surname:

Title: Mr Mrs Ms Miss Dr

Given names:

Date of birth: (DD/MM/YYYY) / /

Residential address:

State: Postcode:

Postal address (if same as above, write "as above"):

State: Postcode:

Telephone (home):

Telephone (work):

Mobile:

Primary email:

Secondary email:

YOUR INVESTMENT CHOICE

Please read your *Energy Super Income Stream Product Disclosure Statement (PDS) Or Market Linked Pension PDS (as applicable)* before making your selection.

Please switch my existing account balance and/or the investment option/s where my regular Income Stream/Market Linked Pension payments are paid from according to the below instructions.

Your total investment allocation for your account balance and regular Income Stream payments must be in whole numbers and add up to 100%.

INVESTMENT OPTION	ACCOUNT BALANCE %	REGULAR INCOME STREAM PAYMENTS DRAWN FROM %
Cash Enhanced		
Stable		
Fixed Interest		
Capital Managed		
Balanced		
SRI Balanced		
Growth		
Indexed Balanced		
International Shares		
Australian Shares		
Total 100%		Total 100%

Please note: If your 'account balance' percentage is incomplete or does not add up to 100%, we are not able to process your request. If your 'account balance' switch is valid but your 'regular income stream payments' percentage is incomplete or does not add up to 100%, your payments will be drawn from your investments in the same proportion as your 'account balance' investment choice.

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AUTO REBALANCING

OPT IN TO AUTO REBALANCING

You can elect to have your investments automatically rebalanced each year. Each July, we will rebalance your investments by switching them back into the percentage options you last chose and will notify you approximately 2 weeks before the rebalance. If you are invested in the default investment strategy, your investments will be switched into the relevant percentage options based on your age at the date of rebalancing.

Rebalancing counts towards your switch total for the year. A switching fee of \$28 will apply if you make another switch during the year using this form. Investment switching is free if you make your switch online through your Member Online account. You can opt out of this choice at any time.

I wish to have my investments automatically rebalanced each year.

OPT OUT OF AUTO REBALANCING

Please print an 'X' in the box below if you have previously elected to have your investments automatically rebalanced each year and you wish to opt out.

I wish to opt out of having my investments automatically rebalanced each year.

DECLARATION

You must sign and date this form. It is advisable to keep a copy.

- I understand that past performance is not a reliable indicator of future performance.
- I understand that all switches are generally processed using the unit price struck for the day in which my completed request is received.
- I understand that the Trustee has performance standards in place for the processing of investment switches and generally investment switch requests will be processed within a few days of receipt. I understand that once I submit my investment switch request, it cannot be revoked.
- I understand that a switching fee of \$28 will apply if I have already made one switch using a *Change of Investment Choice* Form or my investments have been automatically rebalanced this financial year. The Trustee reserves the right to limit the number of switches I can make, each financial year, if I am deemed to be switching excessively and may defer the processing of transactions to maintain the equity of the Fund.
- I understand that if this form is incomplete Energy Super will not be able to process my request.
- I acknowledge that I have made my investment decision after careful consideration of my circumstances and reading the *Energy Super Income Stream* PDS or the *Market Linked Pension* PDS (as applicable) provided by the Trustee. I understand that Energy Super is not responsible for my choice of investment strategy.
- I have read the Privacy Statement provided in the *Energy Super Income Stream* PDS or the *Market Linked Pension* PDS (as applicable). I consent to the disclosure and collection of information about me for the purposes explained in this section.

Applicant's signature:

Date: (DD/MM/YYYY)

 / /

YOUR PRIVACY IS IMPORTANT TO US

We are committed to protecting the privacy of your personal information. When we collect your personal information, we will notify you or take steps to make you aware of the information we collect, how we will manage that information and how to contact us if you have any privacy concerns. You can also read our Privacy Policy at energysuper.com.au/privacy-policy or ask for a copy by contacting us on **1300 436 374** or info@energysuper.com.au

RETURN THIS FORM

Energy Super

PO Box 10530
Brisbane Adelaide Street QLD 4000

F 07 3229 7523

(remember to send all pages of the form)

E member@energysuper.com.au

(as a scanned email attachment)

TALK TO US

T 1300 436 374

E info@energysuper.com.au

W energysuper.com.au

Energy Super

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