

CHANGE OF INVESTMENT CHOICE FORM



INCOME STREAM/MARKET LINKED PENSION

Investment switching is free if you make your switch online through your Member Online 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 processed using the last available unit price at the date that the transaction is processed. 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 note: If you have an investment in the LifetimePlus investment option and would like to switch out, you will need to complete a separate *LifetimePlus Withdrawal Form*.

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

YOUR MEMBER DETAILS

Energy Super member number:

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)*, *Energy Super LifetimePlus Guide* or *Energy Super 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.

To be eligible to invest in LifetimePlus, you must have a minimum of \$20,000 in your Energy Super Income Stream account; a maximum of 50% of your account balance can be invested in LifetimePlus subject to a minimum investment of \$10,000. You cannot invest in LifetimePlus if you have a Transition to Retirement Income Stream account or Market Linked Pension account. Before investing in LifetimePlus, we recommend you seek appropriate written financial advice.

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

For existing LifetimePlus members, please exclude your LifetimePlus investment when updating your new investment option allocation. Please ensure your new investment option allocation still adds up to 100%.

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

IMPORTANT

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.

If you choose the LifetimePlus investment option, you cannot select LifetimePlus for your pension payment drawdown.

YOUR LIFETIMEPLUS EARNINGS DISTRIBUTION PREFERENCE

If you have chosen LifetimePlus as an investment option, please nominate how you would like your half yearly earnings to be paid into your other investment option(s):

My most recent investment choice (*the investment option(s) you've most recently chosen for your account balance excluding LifetimePlus*); or

My payment draw down choice (*the investment option(s) you've chosen to have your regular Income Stream payments drawn from*).

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.

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)

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 processed using the last available unit price at the date that the transaction is processed.
- 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.
- Before investing in LifetimePlus, I acknowledge that the Trustee has recommended that I should seek appropriate written financial advice.
- I acknowledge that if I have selected LifetimePlus, the withdrawal deduction that will apply to my withdrawal from LifetimePlus may constitute a significant proportion of my investment in LifetimePlus and my LifetimePlus withdrawal benefit may be less than my initial investment in LifetimePlus (details of the withdrawal deduction can be found in the *LifetimePlus Guide*).
- I acknowledge that I have made my investment decision after careful consideration of my circumstances and reading the *Energy Super Income Stream PDS*, *Energy Super LifetimePlus Guide* or the *Energy Super 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 *Energy Super 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

TALK TO US

T 1300 436 374

E info@energysuper.com.au

W energysuper.com.au

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