

1. PERSONAL DETAILS



a. Title (please select)

Mr Mrs Miss Ms Dr Other →

[illegible][illegible]

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[illegible]

☐ I have one Pension Account. Please apply my instructions on this form to that account.

[illegible]

\$ _____ .00

2. PAYMENT STRATEGY

Please nominate the payment strategy you would like to use for the ad hoc payment. Select one of the following:

☐ I would like to use my existing nominated payment strategy.

OR

☐ I would like to use the payment strategy I have nominated below.

(Please note, you must have sufficient funds in the options nominated in your payment strategy.)

Diversified options

Defensive	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
Diversified 50	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
Balanced Growth	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
Growth	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
High Growth	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00

Sector options

Cash and Fixed Income sector options¹

Australian Cash	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
Australian Floating Rate	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
Australian Fixed Income	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
Global Fixed Income – \$A Hedged	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00

Equity sector options²

Australian Opportunities	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
Global Opportunities	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
Global Opportunities – \$A Hedged	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00

Specialist sub-sector options³

Emerging Markets	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
International Property Securities – \$A Hedged	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00

Responsible options²

Responsible Australian Shares	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
Responsible Global Shares	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00

Third Party options²

Third Party Indexed Australian Shares	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
Third Party Indexed Global Shares	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
Third Party Indexed Global Shares – \$A Hedged	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00
Total allocation =	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00

¹ These investment options carry a low level of investment risk, which means they are likely to deliver low investment returns. If you're planning to invest a significant amount of your super in these options for more than 1-2 years, it's important to consider this. You should read the PDS and/or get financial product advice before you continue. If you have any questions or want more information, please contact us.

² If you are planning to invest a significant portion of your super in a single asset class, it's worth considering diversification when making decisions about super investments. You should read the PDS and/or get financial product advice before you continue. If you have any questions or want more information, please contact us.

³ These investment options carry a very high level of investment risk. If you're planning to invest a significant amount of your super in these options, it's important to consider this risk. You should read the PDS and/or get financial product advice before you continue. If you have any questions or want more information, please contact us.

3. AD HOC PAYMENT TYPE

You have the flexibility to choose whether your ad hoc payment is treated as an additional pension income payment or a lump sum withdrawal. If you are not sure of the difference between these two payment types, please speak to your financial adviser or call us on 1800 555 667.

Select one of the following:

☐ Additional pension income payment

If you are under age 60, normal PAYG pension income payment tax will be applied. If you have a maximum pension payment limit in place, your ongoing pension payment amount may be adjusted to ensure the maximum limit is not breached.

OR

☐ Lump sum withdrawal

This option is not available if you have a maximum pension payment limit unless you have a non-preserved amount in your pension. A lump sum withdrawal does not count towards your minimum annual pension payment limit. If you are under age 60, the payment will be treated as a lump sum superannuation payment for tax purposes. Your pension Deductible Amount for social security purposes may change. Before we can make a lump sum withdrawal payment to you, we are required by law to calculate any remaining pro rata minimum pension payment for the current financial year and pay this to your nominated account.

Please note: The required minimum account balance on your iQ Retirement account is \$6,000 at all times. If, after processing your ad hoc payment request, the combined total of your Contribution Account and your Pension Account(s) will drop below \$6,000, we may process this as a request to close your account. We will pay the balance of your investment holding and close your account. We might be required to transfer any remaining amounts to either your nominated bank account or to the Australian Taxation Office. Please contact us before sending this request, if you would like to confirm your account balance before proceeding.

4. AUTHORISATION

If you have an adviser it is important that you consult them prior to effecting changes to your account. If you have consulted your adviser regarding this change or you would like to proceed with this request without speaking with your adviser please sign, date and return this form to us.

If signed under Power of Attorney, the attorney verifies that no notice of revocation of power has been received.

Name

[illegible]

Member signature

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Date (DD MM YYYY)

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We're here to help

Please send your completed form to: iQ Super by Russell Investments, Locked Bag A4094, Sydney South NSW 1235.

If you have any questions, please call us on **1800 555 667** (Monday to Friday 8.30am to 5.30pm AEST), email iq@russellinvestments.com.au or visit russellinvestments.com.au/super

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In preparing this form, the Trustee has not taken into account the investment objectives, financial situation or needs of any person. Accordingly, before making a decision to invest in a product, you should read the current Product Disclosure Statement (PDS) and seek advice tailored to your own financial circumstances. Call us on 1800 555 667 or visit russellinvestments.com.au for a copy of the PDS. Total Risk Management Pty Limited ABN 62 008 644 353, AFSL 238790. Trustee of the Russell Investments Master Trust ABN 89 384 753 567.

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