

Change Investments Form

Use this form to advise any changes to your investment options. Print clearly in BLOCK LETTERS.

1. Member details

a. Title (please select):

Mr Mrs Ms Dr Other >

b. Member surname

c. Member first name(s)

d. Date of birth (DD MM YYYY)

e. Sex (please select)

Male Female

f. Member number

Please note:

- > You can use this form to instruct us to switch your investments by redeeming amounts from your nominated investment options and reinvesting the proceeds into other investment options in your Pension Account(s) and/or Contribution Account. This process usually takes effect two business days after we receive your request, but will be delayed if your request clashes with another transaction such as a monthly pension payment.
- > There are transaction costs associated with making a switch, which are expressed as a buy-sell spread. You must provide us with specific instructions for your Contribution Account and Pension Account(s).
- > Buy/sell spreads apply to some investment options. Please refer to the russellinvestments.com.au/iqbuysellspread for more information.

2. Contribution Account

Complete this section to switch the investments held in your Contribution Account.

Option A: Tick this box if you do NOT want to change your Contribution Account investments.

OR

Option B: Complete the below table to switch the investments held in your Contribution Account.

You can choose an investment strategy that applies to both your Current Benefit and your Future Transactions. Your Current Benefit is the balance you already have in the Fund. Your Future Transactions include contributions, deductions and rollovers processed in the future.

Alternatively, you can choose an investment strategy for your Current Benefit and a different strategy for your Future Transactions. For example:

- > Current Benefit – 100% Balanced
- > Future Transactions – 50% Balanced; 50% Defensive.

This would mean all the funds you currently have would be invested in the Balanced Option, but contributions you make in the future would be split between the Balanced and Defensive Options.

By completing this form, you are directing the Trustee to invest your Current and/or Future Benefit in accordance with the investment strategy shown in the table below. You can update your choice(s) at any time by logging into your online account via russellinvestments.com.au/login

The effective date of processing will be two business days after the Fund receives your completed form.

3. Pension Account(s)

Complete this section to switch the investments held in your Pension Account(s).

Option A: If you have more than one Pension Account, you must identify the Pension Account to which your instructions on this form apply.

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

I have more than one Pension Account. Please apply the instructions on this form to the account number:

OR

Option B: Tick this box if you do NOT want to change your Pension Account(s) investments.

OR

Option C: Complete the below table to switch the investments held in your Pension Account.

You can choose an investment strategy that applies to both your Current Benefit and your Future Transactions. Your Current Benefit is the balance you already have in the Fund. Your Future Transactions include contributions, deductions and rollovers processed in the future.

Alternatively, you can choose an investment strategy for your Current Benefit and a different strategy for your Future Transactions. For example:

- › Current Benefit – 100% Balanced
- › Future Transactions – 50% Balanced; 50% Defensive.

This would mean all the funds you currently have would be invested in the Balanced Option, but contributions you make in the future would be split between the Balanced and Defensive Options.

By completing this form, you are directing the Trustee to invest your Current and/or Future Benefit in accordance with the investment strategy shown in the table below. You can update your choice(s) at any time by logging into your online account via russellinvestments.com.au/login

The effective date of processing will be two business days after the Fund receives your completed form.

4. Investment options for Contribution and Pension Accounts

My investment choice is:	Contribution Account				Pension Account							
	Current ¹		Future ²		Current ¹		Future ²					
Diversified options												
1. Defensive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
2. Diversified 50	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
3. Blended Balanced	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
4. Balanced	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
5. Balanced Opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
6. Growth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
7. High Growth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
Outcome-oriented options												
8. Multi-Asset Income Strategy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
9. Multi-Asset Growth Strategy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
Sector options												
10. Australian Cash	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
11. Australian Cash Enhanced	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
12. Australian Fixed Income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
13. Australian Opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
14. Global Fixed Income – \$A Hedged	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
15. Global Opportunities – \$A Hedged	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
16. Global Opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
17. International Property Securities – \$A Hedged	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
18. Emerging Markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
Responsible options												
19. Responsible Australian Shares	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
20. Responsible Global Shares	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
Third Party options												
21. Third Party Indexed Australian Shares	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
22. Third Party Indexed Global Shares	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
23. Third Party Indexed Global Shares – \$A Hedged	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	.00%
Total =	1	0	0	.00%	1	0	0	.00%	1	0	0	.00%

1 New strategy for Current Benefit

2 New strategy for Future Transactions

