

# Investment Choice Form



Use this form to make or change your investment choice. Print clearly in BLOCK LETTERS.

Did you know that you can update your investment choice online? Simply log in to your account at [russellinvestments.com.au/login](http://russellinvestments.com.au/login) and select Investments.

## 1. Personal details

! If you would like more details about how we collect, use and disclose your personal information, you can access the Trustee’s privacy policy at [russellinvestments.com.au/privacy](http://russellinvestments.com.au/privacy) or call us on 1800 555 667.

a. Title (please select)

Mr  Mrs  Miss  Ms  Dr  Other  >

b. Surname

c. First name(s)

d. Date of birth (DD MM YYYY)

e. Sex (please select)

Male  Female

f. Member number

g. Address

State    Postcode

h. Work telephone

i. Home telephone

j. Mobile telephone<sup>1</sup>

k. Primary/personal email address<sup>2</sup> (Give us your email address to receive all future communications electronically.)

Secondary/work email address<sup>2</sup>

<sup>1</sup> We may SMS you from time to time.  
<sup>2</sup> By providing your email address, you are advising us that online communication is your preferred method of communication. Going forward, we will email you with information and also advise when a communication has been added to your online account. We will issue paper communications rarely or where your email address no longer works. You can change your preferred method of communication at any time by calling us or logging in to your online account at [russellinvestments.com.au/login](http://russellinvestments.com.au/login)

IN PREPARING THIS FORM THE TRUSTEE HAS NOT TAKEN INTO ACCOUNT THE INVESTMENT OBJECTIVES, FINANCIAL SITUATION AND PARTICULAR NEEDS (FINANCIAL CIRCUMSTANCES) OF ANY PERSON. ACCORDINGLY, BEFORE ACTING ON ANY ADVICE, YOU SHOULD ASSESS WHETHER THE ADVICE IS APPROPRIATE IN LIGHT OF YOUR OWN FINANCIAL CIRCUMSTANCES. TOTAL RISK MANAGEMENT PTY LIMITED ABN 62 008 644 353, AFSL NO. 238790, TRUSTEE OF THE RUSSELL INVESTMENTS MASTER TRUST ABN 89 384 753 567. SS\_F\_Gen\_InvChoice\_V1F\_2009

## 2. Search for your super

Tick this box to provide consent.

By ticking this box, you are consenting to the Trustee of the Russell Investments Master Trust (the Fund, iQ Super) using your Tax File Number (TFN) to search for other super accounts you may have, now and in the future, using a facility provided by the Australian Taxation Office (ATO). We will automatically consolidate any ATO-held super (known as Lost or Unclaimed money). If we find any super with other funds we will let you know, so you can decide if you want to transfer them into your iQ Super account.

## 3. Make an investment choice

You can choose to invest in GoalTracker (a personalised investment strategy built around you) or set your own investment strategy.

### 1. Choose the GoalTracker Option

By ticking the box, GoalTracker will automatically invest your super based on information it knows about you, such as your age. The more you tell us, the more we're able to personalise your investment strategy with GoalTracker Plus.

**Note:** the GoalTracker Option is not available to defined benefit members.

Personalised option	Current balance <sup>1</sup>	Future transactions <sup>2</sup>
GoalTracker	<input type="checkbox"/> 1 <input type="checkbox"/> 0 <input type="checkbox"/> 0 .00%	<input type="checkbox"/> 1 <input type="checkbox"/> 0 <input type="checkbox"/> 0 .00%

OR

### 2. Set your own investment strategy

Choose one or more options in the table below. You can select the same or different options for your current balance and future transactions.

#### Diversified options

Defensive	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%
Diversified 50	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%
Blended Balanced	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%
Balanced Growth	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%
Growth	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%
High Growth	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%

#### Outcome-oriented options

Multi-Asset Income Strategy	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%
Multi-Asset Growth Strategy	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%

#### Sector options

Australian Fixed Income	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%
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%
Global Opportunities – \$A Hedged	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%
Emerging Markets	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%
Australian Cash	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> .00%

(Continued over)

**4. Make an investment choice (continued)**

	Current balance <sup>1</sup>	Future transactions <sup>2</sup>
Australian Floating Rate	<input type="text"/> <input type="text"/> <input type="text"/> .00%	<input type="text"/> <input type="text"/> <input type="text"/> .00%
Australian Opportunities	<input type="text"/> <input type="text"/> <input type="text"/> .00%	<input type="text"/> <input type="text"/> <input type="text"/> .00%
International Property Securities – \$A Hedged	<input type="text"/> <input type="text"/> <input type="text"/> .00%	<input type="text"/> <input type="text"/> <input type="text"/> .00%
Global Opportunities	<input type="text"/> <input type="text"/> <input type="text"/> .00%	<input type="text"/> <input type="text"/> <input type="text"/> .00%
<b>Responsible options</b>		
Responsible Global Shares	<input type="text"/> <input type="text"/> <input type="text"/> .00%	<input type="text"/> <input type="text"/> <input type="text"/> .00%
Responsible Australian Shares	<input type="text"/> <input type="text"/> <input type="text"/> .00%	<input type="text"/> <input type="text"/> <input type="text"/> .00%
<b>Third party options</b>		
Third Party Indexed Australian Shares	<input type="text"/> <input type="text"/> <input type="text"/> .00%	<input type="text"/> <input type="text"/> <input type="text"/> .00%
Third Party Indexed Global Shares	<input type="text"/> <input type="text"/> <input type="text"/> .00%	<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"/> .00%	<input type="text"/> <input type="text"/> <input type="text"/> .00%
<b>Total allocation =</b>	<b>1 0 0</b> .00%	<b>1 0 0</b> .00%

<sup>1</sup> The balance you already have in your account.

<sup>2</sup> All future transactions including contributions, deductions and rollovers.

Your request will be effective two business days after we receive your completed form. You can update your choice(s) at any time by logging into your online account at [russellinvestments.com.au/login](http://russellinvestments.com.au/login)

When you make an investment choice you become a 'Choice' member.

**Do you want to rebalance your investments?**

This is only relevant to you, if you have selected more than one investment option. If you select to rebalance your investments, we reset your account balance on the 15th of each month, to match the original investment strategy you selected.

Below is an example where the member investment strategy is 50% Balanced Growth and 50% Defensive:

	BALANCED GROWTH	DEFENSIVE	TOTAL
Initial investment	\$5,000	\$5,000	\$10,000
Your balance on the 15th of the following month	\$5,300	\$5,100	\$10,400
Your balance after rebalancing	\$5,200	\$5,200	\$10,400

If you select this option, you cannot switch your investments during the two working days prior to the 15th of each month. You cannot select this option if you have selected different strategies for your Current balance and Future transactions.

**I would like to rebalance my investments automatically each month:**

Yes  No

**5. Declaration and signature**

This form must be signed by the applicant. If signed under Power of Attorney, the attorney verifies that no notice of revocation of power has been received. A certified copy of the Power of Attorney must be forwarded with this form.

Signature

Date (DD MM YYYY)

Member name

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➤ **Please return this form to:**  
**iQ Super by Russell Investments**  
Locked Bag A4094  
Sydney South NSW 1235

**You can also contact us as follows:**  
Toll free on **1800 555 667**  
Operating hours are from  
Monday to Friday, 9am – 5pm (AEST)  
[iq@russellinvestments.com.au](mailto:iq@russellinvestments.com.au)  
[russellinvestments.com.au/super](https://russellinvestments.com.au/super)