

# Change to Member Investment Choice



ALL SECTIONS MUST BE COMPLETED

PLEASE  NOT

PLEASE USE BLOCK LETTERS



This form should be used to change your investment options with Club Super. Please complete, sign and return to Club Super via post or email.

## ARE YOU A MEMBER OF CLUB SUPER?

YES  NO If YES, Member No:

**Note:** if you have changed your name since first becoming a member please attach a certified copy of your Marriage Certificate, Deed Poll or a Statutory Declaration as proof.

## PERSONAL DETAILS

DATE OF BIRTH

 /  / 

GENDER

MALE  FEMALE

TITLE

MR  MRS  MISS  OTHER

SPECIFY IF OTHER

FIRST NAME

MIDDLE NAME

FAMILY NAME

STREET NUMBER

STREET NAME

SUBURB/TOWN

STATE

POSTCODE

**POSTAL ADDRESS** (If same as above, write "as above")

PO BOX

SUBURB/TOWN

STATE

POSTCODE

EMAIL ADDRESS

TELEPHONE NUMBER

MOBILE NUMBER

## MEMBER INVESTMENT CHOICE

As a member of Club Super you can choose one investment option or a mix of different options. You can change the investment options for your Existing Account Balance, your Future Contributions, or both. **Please indicate your chosen option/s by crossing the relevant box/s and completing column/s A and/or B below.**

- To change the investment options for your Existing Account Balance, complete column A (below).
- To change the investment options for all future monies received into your account (new contributions and rollovers in) only, complete column B.
- To change the investment options for **both** your Existing Account Balance and all future monies (new contributions and rollovers in) complete columns A & B.

## MEMBER INVESTMENT CHOICE

	A Existing Account Balance	B Future Contributions
Club MySuper	_____ %	_____ %
Growth	_____ %	_____ %
Capital Stable	_____ %	_____ %
Cash	_____ %	_____ %
Australian Shares	_____ %	_____ %
International Shares	_____ %	_____ %
Property	_____ %	_____ %
Fixed Interest	_____ %	_____ %
Must total:	100%	100%

You are able to choose one investment option, or a mix of different options.

Please nominate your chosen combination of investment options. Refer to the *How we invest your money* section of the *Product Disclosure Statement (PDS)* and *Additional Information - How we invest your money* available at clubsuper.com.au for further information.

Club Super does not charge a fee if you wish to switch your option/s. For more information surrounding processing times and effective dates of switches, see *Additional Information - How we invest your money* (as above).

**If you choose more than one investment option, your nominated percentage for each option can include up to 2 decimal places and must total 100%.**

### FOR EXAMPLE:

Club MySuper	50%
Cash	20%
Property	10%
Australian Shares	20%
<b>Total</b>	<b>100%</b>

## PLEASE COMPLETE DETAILS ON THE NEXT PAGE

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## DECLARATION AND SIGNATURE

In signing this form, I:

- acknowledge I have read and understood the terms of the most recent Product Disclosure Statement (PDS) and Financial Services Guide (FSG) and acknowledge it does not constitute personal advice;
- acknowledge that all conditions relating to Member Investment Choice, including the cost of switching, are subject to change from time to time at the discretion of the Trustee;
- agree to be bound by the terms and conditions contained in the trust deed and Product Disclosure Statement and Financial Services Guide;
- acknowledge that the Trustee has informed me that I may wish to seek independent financial advice;
- declare that the information in this application form is true and correct to the best of my knowledge and belief.

SIGNATURE

DATE

### Your privacy is important to us

When your personal details are provided to Club Super, they are securely stored and accessible only to authorised personnel and third parties for the purpose of administering your account. If you would like to see Club Super's Privacy Policy visit [clubsuper.com.au](http://clubsuper.com.au) or call us on 1300 369 330 for a copy of the Privacy Policy.

## HOW DOES MEMBER INVESTMENT CHOICE WORK

You can choose or mix different options for your Existing Account Balance and separately for any future monies (new contributions and rollovers in). Your selection for each option can include up to 2 decimal places and must total 100.

### Not sure how to complete this form?

Provided below are three examples of different scenarios which may assist you in completing this form.

### Examples

1. Tom has previously nominated for both his Existing Account Balance and all new contributions to be invested in 80% Club MySuper / 20% Cash. Tom completes the Change to Member Investment Choice Form (column B) advising that he now wants his Future Contributions invested differently (70% Australian Shares / 30% Property). All new monies received for Tom will then be invested according to this nomination.

2. Barry has never previously nominated any investment options to Club Super, so his entire account balance is invested in the default Club MySuper option. Barry now wants his Existing Account Balance to be invested in 100% Growth and wants his Future Contributions to be invested in 50% International Shares / 50% Property. Barry completes the *Change to Member Investment Choice* form (columns A & B), reflecting the above selections.

3. Mandy has previously nominated for her Existing Account Balance to be invested in 40% Club MySuper / 40% Growth / 20% Cash and for her Future Contributions to be invested 100% Cash. Mandy now wants her Existing Account Balance to be invested in 70% Capital Stable / 30% Club MySuper and so completes the *Change to Member Investment Choice* form (column A), reflecting the above selections. Mandy's existing account balance is switched to 70% Capital Stable / 30% Club MySuper, and her Future Contributions will continue being directed to 100% Cash.

For information on the Club Super investment objectives and strategies for each investment option, see *Additional Information – How we invest your money* located at [clubsuper.com.au](http://clubsuper.com.au) > Members > Publications > Additional Information.

Club Plus Qld. Pty. Ltd. (ABN 30 010 892 396) is the Trustee of Club Super (ABN 12 737 334 298), is Corporate Authorised Representative number 268814 under Australian Financial Services Licence No. 238507 and is authorised to provide general financial product advice in relation to superannuation. This information is of general nature only, it does not take into account your individual financial situation, objectives or needs. You should consider your own financial position and requirements before making a decision. You may like to consult with a licensed financial adviser in order to assist you with this. You should refer to the *Club Super Product Disclosure Statement and Financial Services Guide* and *Additional Information – How we invest your money* before making a decision.

## HAVE YOU COMPLETED ALL RELEVANT SECTIONS OF THIS FORM?

RETURN COMPLETED FORM TO: CLUB SUPER PO BOX 10726 BRISBANE ADELAIDE STREET QLD 4000

OR EMAIL A SCANNED COPY OF THE COMPLETED FORM TO: [info@clubsuper.com.au](mailto:info@clubsuper.com.au)

Club Plus Qld. Pty. Ltd. (ABN 30 010 892 396), the Trustee of Club Super (ABN 12 737 334 298) is Corporate Authorised Representative No. 268814 under AFSL No. 238507. Club MySuper Product Unique Identifier 12737334298988.