Changing your investment option

electricsuper

Income Stream members: use this form to change your investment option

1. Your details

Title: ☐ Mr ☐ Ms ☐ Mrs ☐ Other

Date of birth (dd/mm/yyyy)

Given name(s)

Surname

Residential address (required)

Suburb/Town | State | Postcode

Postal address (if different)

Unit number | Street number | Street name

Suburb/Town | State | Postcode

Telephone (business hours) | Mobile

Email address

Secondary email address

Member number (if known)

2a. Choose your investment option to invest your account balance

I would like to change my investment option as follows:

☐ % in High Growth

☐ % in Balanced Growth

☐ % in Conservative Growth

☐ % in Cash

100 **% Total**

If you don't make a choice, you'll automatically be invested in the default investment option, which is Balanced Growth.

2b. Choose your investment option to draw your income payments

You can choose to have your pension payments made from one or more of the investment options you have chosen above for your account balance. For example, if your account is invested 80% Balanced Growth and 20% Cash, you could choose to have your payments made from the Balanced Growth option only.

Once there is no longer enough money in your chosen option(s), payments will be deducted from the account balance invested in your other option(s). We will notify you at that time and you can adjust your investment choice if desired.

I would like to draw my regular income payments from my investments as follows:

	% in High Growth
	% in Balanced Growth
	% in Conservative Growth
	% in Cash
100	**% Total**

3. Sign this form

By signing this form, I confirm that I:

- understand the cut-off time to lodge my investment choice change:
  - if received by ElectricSuper by 5pm on the last working day of the month, it will be processed within that month
  - if received by ElectricSuper after 5pm on the last working day, it will be processed with the effective date at the end of the next month
- understand that my investment choice will affect my current balance as well as future contributions
- understand that my account balance will fluctuate with investment earnings in my chosen investment option/options
- understand that my investment option change may not be visible in the online portal for up to a month (if I have portal access)
- know that my investment choice request will not be actioned if the information is incomplete or unclear. I will be contacted if this is the case
- consent to my email address being used to send me information from ElectricSuper
- understand that ElectricSuper may disclose my personal information to the administrator or any other necessary party and I consent to my personal information being handled this way.

Signature

(dd/mm/yyyy)

Note about timeframes

If your investment switch request is received by 5pm on the last working day of the month, it will be processed that month. If it is received after 5pm on the last working day, it will be processed with the effective date at the end of the next month.

If you have online portal access, your investment change may not be visible in the online portal for up to a month.

Lodge your form

electricsuper.admin@rs.mpms.mufg.com

or

Post to: ElectricSuper
PO Box 126 Parramatta NSW 2124

Your privacy

Refer to www.electricsuper.au/privacypolicy for information on how your provided information is used and how we treat your privacy.

Queries

1300 307 844
www.electricsuper.au

Issued by the Electricity Industry Superannuation Board ABN 42 457 486 237 as trustee of the Electricity Industry Superannuation Scheme ABN 57 923 283 236

Disclaimer: The information relating to ElectricSuper is subject to change from time to time. The ElectricSuper Rules (the 'Rules') are the final authority when any discrepancy arises between the Rules and any other information about the scheme. The Electricity Industry Superannuation Board recommends that you consult a licensed or appropriately authorised financial consultant before taking action regarding your superannuation.

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