Changing your investment option (DB)

Defined benefit 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

Membership number

2. Choose your investment option

I would like to change my investment option as follows:

____ % in High Growth

____ % in Balanced Growth

____ % in Conservative Growth

____ % in Cash

100 % Total

This change applies to your Voluntary contribution account and Rollover account only.
(These are sub-accounts within your ElectricSuper account)
Lump Sum (Division 2) and RG (Division 4) members have investment choice on the other sub-accounts within your ElectricSuper account. You must Go to Section 3 to make your investment choice on your other sub-accounts.

3. Defined Benefit option (Division 2 & Division 4 defined benefit schemes only)
Division 2 Lump Sum Scheme & Division 4 RG Scheme

Your ElectricSuper account is made up of different account balances.

The account balances linked to your defined benefit option (such as your member contribution account) are not included in the change you've made at Section 2.

I would like to change my investment option in my other accounts (such as my member contribution account) as follows:

☐ 100% in Balanced Growth

or

☐ 100% in Cash

If you are a member of the Division 2 or Division 4 defined benefit schemes, you must complete Section 2 and 3 of this form.

4. 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
- have completed Section 2 and Section 3, if a member of Division 2 (Lump Sum) or Division 4 (RG)
- consent to my email address being used to send me information from ElectricSuper

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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