

Investment Switch



Use this form to request Australian Catholic Superannuation to change the investment options for your current investment choice and/or future contributions. Simply complete this form using a dark pen and capital letters or type directly into this form online, print it out and send it to us. Ensure all appropriate check boxes are marked with an (x).

Once the form is complete, remember to sign and date it. Return the form to:

Australian Catholic Superannuation and Retirement Fund
PO Box 656, Burwood NSW 1805

✉ PO Box 656, Burwood NSW 1805

☎ 1300 658 776

🌐 www.catholicsuper.com.au

🐦 @AskAusCathSuper

✉ fundoffice@catholicsuper.com.au

Important

Client ID login allows you to access our service via the internet. Ask us about setting up this convenient service.

1 Your current details

Client ID		Account number	Date of birth	Male	Female
1			D D M M Y Y Y Y	<input type="checkbox"/>	<input type="checkbox"/>
Title	Surname				
Given names					
Postal address					
Suburb			State	Postcode	
Mobile		Home telephone number			
Email					

By providing my email address, I elect to receive Australian Catholic Superannuation communication electronically, including my annual statement, general correspondence and emails.

Form continues overleaf ▶



i Important

Each investment option has its own level of risk. We suggest reading the *Your investment options: Superannuation Fact Sheet* available on catholicsuper.com.au before making any investment decisions.

2 Investment option choice

Choose (X) from the following two options:

- Switch into the Lifecycle investment options, LifetimeOne**
(you do not need to complete anything, this will be processed automatically).
- Build my own options**
(select your options by completing the table to the right).

You can choose to invest in any one or a combination of up to 13 investment options.

If you wish to switch the investment choice for both your existing account balance **and** your future contributions, you will need to complete both columns A and B.

Investment option	A Existing Account Balance	B Future Contributions
Managed options		
High Growth	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Shares	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Growth	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Socially Responsible Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Build your own options		
Australian Shares	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
International Shares	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Property	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Bonds	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Cash and Term Deposits	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Credit Income	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Total	1 0 0 %	1 0 0 %

i Please use whole numbers and ensure your choice equals 100%.

! Take note

Don't forget to sign and date your form before sending it back to us. **We do not accept digital signatures.**

3 Declaration

By signing this form, I agree to Australian Catholic Superannuation changing my investment choice for my existing account balance and/or any future contributions I make to the Fund.

- I have obtained and read the information on investments contained in the current *Product Disclosure Statement* and the *Your Investment Choice* fact sheet.

- I understand the effect of, and any risk involved in, switching my investment option(s) and agree that the Fund has no liability.
- I understand and agree that it is my responsibility to ensure Australian Catholic Superannuation has received my *Investment Switch* form.
- I acknowledge that if this form is received by the Fund unsigned or incomplete, my request will not be processed.

Print full name (use BLOCK letters)

Signature



Date

i Important

We may use an additional unit price at the end of the financial year so the switching dates will differ from the ordinary schedule. Please contact the Fund if you require more information.

i There is no direct fee for switching.

Investment switches are processed on a forward pricing basis. This means that your switch will be processed at unit prices set **after** this application is received. Unit prices are normally set on a Tuesday. In order to receive the unit price set on a particular Tuesday, Australian Catholic Superannuation must receive this form by the close of business (5.30pm AEST or AEDST) on the Friday before.

Important: A cancellation of investment choice will be accepted up to Friday 5.30pm AEST only.

PRIVACY STATEMENT: By signing this form you consent to Australian Catholic Superannuation and Retirement Fund collecting and using your personal information to manage your superannuation and to comply with relevant legislation. If you do not provide this information, we may not be able to accurately manage your superannuation. Your personal information may be disclosed to other parties, including the Trustee Board, the Fund's insurer and professional advisors, government bodies and the trustee of any other fund to which you transfer. To access your personal information or for a copy of our Privacy Policy, visit catholicsuper.com.au or phone **1300 658 776**.

Contact us

Please sign and date this form and return it to us:

- Australian Catholic Superannuation and Retirement Fund
PO Box 656, Burwood NSW 1805
- (02) 9715 0090

For more information contact our helpful staff:

- 1300 658 776
- www.catholicsuper.com.au
- fundoffice@catholicsuper.com.au
- @AskAusCathSuper

