Super change of investments form

aware SUPER

You should use this form if you wish to change the investment option(s) in which your Personal Retirement Plan or Tailored Super Plan account is invested, or the investment option(s) in which your deposits are invested.

Please use a dark pen and CAPITAL letters, or type directly into this form online, print it and send it to us. Use (✗) to mark boxes.

Refer to the notes section below for information on how to change your account details electronically using our secure client portal. If you have any questions, please call us on **1800 620 305**.

IMPORTANT!
Although it may take a few days for your switch to be confirmed and visible in your online account, if we receive your request by 2pm Sydney time on a business day, your account balance switch will be effective on the day it is received. Otherwise your switch will take effect from the next business day.

1. Your details

Client ID

Account number

Date of birth D D / M M / Y Y Y Y

Title

Last name

Given name(s)

2. Change your investment choice

Switch the dollar amount

Complete this section to switch dollar amounts from one investment option to another. The minimum switch amount is $500.

Please specify the amount you wish to switch in dollars. The 'From' and 'To' columns must total the same amount otherwise your switch request will be invalid.

Fund name	From	To
Diversified investment options		
High Growth	$	$
Growth	$	$
Socially Conscious	$	$
Balanced Growth	$	$
Conservative	$	$
Defensive	$	$
Single asset class investment options		
Australian Equities	$	$
International Equities	$	$
Property	$	$
Fixed Interest	$	$
Cash	$	$
Total	$ 0.00	$ 0.00

3. Portfolio rebalance

Complete this section to re-allocate your investment so that **after** the re-allocation it has the profile you require. Do not complete this section if you have completed section 2.

Choose from the options below. Please use whole percentages only and ensure your total investment choice adds up to 100%.

Fund name	Percentage allocation
Diversified investment options	
High Growth	%
Growth	%
Socially Conscious	%
Balanced Growth	%
Conservative	%
Defensive	%
Single asset class investment options	
Australian Equities	%
International Equities	%
Property	%
Fixed Interest	%
Cash	%
Total (must add to 100%)	0 %

4. Deposit profile

Complete this section to nominate the percentage amount of each contribution or rollover you wish to allocate to each investment option (must add to 100%).

Fund name	Percentage allocation
Diversified investment options	
High Growth	%
Growth	%
Socially Conscious	%
Balanced Growth	%
Conservative	%
Defensive	%
Single asset class investment options	
Australian Equities	%
International Equities	%
Property	%
Fixed Interest	%
Cash	%
Total (must add to 100%)	0 %

Please read the **Declaration** and refer to the relevant PDS for your product for further information.

If you have any questions please call us on **1800 620 305**.

5. Declaration and signature

- All information provided on this form is accurate and complete.
- I have read the current Product Disclosure Statement for the relevant product as well as any supplements or on-line updates. The PDS is available by typing **retire.aware.com.au/PDS** into my internet browser.
- I acknowledge that I have read and understood the privacy section in the PDS and consent to the collection, handling, use and disclosure of my personal information in accordance with the Privacy Act 1988 and as described in the PDS.
- I agree to be bound by the trust deed for Aware Super, as amended from time to time.
- I understand that if my transaction is received at Aware Super before 2.00pm Sydney time on any business day, it will be on processed using the unit price applicable for that day. This price will be struck on business day 2 and applied to my transaction. If my transaction is received at Aware Super after 2.00pm Sydney time on any business day it will be processed using the unit price applicable for the next business day. This price will be struck on business day 3 and applied to my transaction. It is important to consider this when making your transaction request.

On completion of this form please print and sign by hand.

Signature

Date signed

D D / M M / Y Y Y Y

Send the form to this address.

6. Where to send your completed form

Return the completed form to **Registry, Aware Super, PO BOX 5336, Sydney NSW 2001**, if you have any questions please call us on **1800 620 305**.

7. Privacy

We have implemented a privacy policy which will ensure the confidentiality and security of your personal information. The Privacy Policy expresses our commitment to the management of your personal information. The policy is available at your request, or at **aware.com.au/privacy.**

8. Electronic submission of changes via secure client portal

Changes to your account can be submitted electronically only via the secure client portal. To register for the portal go to **retire.aware.com.au/registration**

If your the change to your investments is submitted via our secure client online portal and submitted electronically before 3.00pm Sydney time on any business day, it will be processed using the unit price applicable for that day. This price is not known until the next business day. It is important to consider this when making your transaction request.

If the change to your investments is submitted electronically after 3.00pm Sydney time on a business day, or on a non-business day, we treat it as having been received before 3.00pm Sydney time on the next occurring business day and it will be processed using the unit price applicable for that next occurring business day.

Save form | Print form | Clear form