

# Change of income stream investment details



You should use this form if you wish to change the investment option(s) in which your income stream is invested, or the order in which payments are drawn from your investment option(s).

Please use a dark pen and CAPITAL letters, or type directly into this form online, print it and send it to us. Use (X) to mark boxes. Forms are located on our website at [aware.com.au/forms](http://aware.com.au/forms)

If you have any questions, please call us on 1300 650 873.

## 1. Your personal details

Member number	Account number	Date of birth (DD-MM-YYYY)	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Title	Last name		
<input type="text"/>	<input type="text"/>		
Given name(s)			
<input type="text"/>			
Address			
<input type="text"/>			
<input type="text"/>			
Suburb	State	Postcode	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Daytime contact number	Mobile number		
<input type="text"/>	<input type="text"/>		
Email (for security reasons, please ensure that your nominated email address is your personal email address and not a role-based email address such as employee_title@company.com.au)			
<input type="text"/>			

**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 before 4 pm AEST/AEDT 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.

## 2. Change your investment choice

**LIFE CYCLE STRATEGY**  
If you choose the Life Cycle strategy, you will be invested in the Growth option prior to your 60th birthday then automatically switched to the Balanced Growth option at age 60.

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

Pre-mixed	Percentage	Single asset class	Percentage
High Growth	<input type="text"/> %	Australian Equities	<input type="text"/> %
Growth	<input type="text"/> %	Australian Equities SRI	<input type="text"/> %
Diversified SRI	<input type="text"/> %	International Equities	<input type="text"/> %
Balanced Growth	<input type="text"/> %	Property	<input type="text"/> %
Conservative Growth	<input type="text"/> %	Australian Fixed Interest	<input type="text"/> %
		International Fixed Interest	<input type="text"/> %
		Cash	<input type="text"/> %



**i** If we receive a request to change your payment details **before 4 pm AEST/AEDT** on a business day, then the change will take effect on the next business day.  
If we receive a request to change your payment details **after 4 pm AEST/AEDT** on a business day, then the change will take effect on the business day **after** the next business day.


### 3. Change your payment details

If you have invested in more than one investment option, you can choose how your pension payments are deducted from these options. The three choices are shown below. If you don't make a choice, your pension payments will be deducted 'pro-rata'. See the relevant *Member Booklet* for income stream members for more details.

**Pro-rata**  
Your payment will be deducted from each investment option in the same proportion that your balance is invested.

**Priority**  
Your payments will be deducted in the order you nominate under Priority in the table below. When your first choice has been fully drawn, we will draw from your second choice and so on. **You must number all of your chosen investment options.**

Pre-mixed	Priority	Single asset class	Priority
High Growth	<input type="checkbox"/>	Australian Equities	<input type="checkbox"/>
Growth	<input type="checkbox"/>	Australian Equities SRI	<input type="checkbox"/>
Diversified SRI	<input type="checkbox"/>	International Equities	<input type="checkbox"/>
Balanced Growth	<input type="checkbox"/>	Property	<input type="checkbox"/>
Conservative Growth	<input type="checkbox"/>	Australian Fixed Interest	<input type="checkbox"/>
		International Fixed Interest	<input type="checkbox"/>
		Cash	<input type="checkbox"/>

 **Percentage**  
This is only available online once you are registered for online access. Until you are registered, you can choose one of the two options above.

### 4. Privacy

The personal information provided on this form is collected by and held for Aware Super by the fund administrator, Mercer Administration, in accordance with the Australian Privacy Principles of the *Privacy Act 1988 (Cth)*, for the purpose of administering accounts and providing services associated with fund membership. For further information about how personal information is handled, please call us on **1300 650 873** or visit [aware.com.au/privacy](http://aware.com.au/privacy) to view the privacy policy (a hard copy of the policy may also be provided on request). The policy contains information about access to and correction of personal information, how a complaint can be made about a privacy breach and other important information about how personal information is collected, used and disclosed.


### 5. Declaration

- I have read and understand the investment section of the relevant current *Member Booklet* for income stream members.
- I acknowledge that the repayment of capital or the performance of any investment option is not guaranteed.
- I understand that my nomination of investment option(s) for my account balance and payments will override and change any previous choice I have made.
- I understand that if I was previously invested in the Life Cycle strategy, then by choosing one of the investment options under the Choice strategy, my account balance will not be switched automatically to the Balanced Growth option when I turn 60.
- I understand that a valid switch request can only be cancelled online before the cut-off time on the day the request is received, if it is a business day. If it is not a business day, I can cancel my switch before the cut-off time on the next business day. I will need to login to my online account to do this.
- I understand that a valid switch request cannot be altered and I will have to submit a new switch request if I want to make changes to my investment choice or payment order.
- I understand that I will receive a confirmation letter which confirms the changes made to my account. If these changes are not consistent with my instructions I acknowledge that I must contact Aware Super immediately.
- I have read and understand the Aware Super privacy policy.

 Please sign and date form here.

Signature

Date signed (DD-MM-YYYY)  
  -   -

 Send the form to this address.

### 6. Where to send your completed form

Return the completed form to **Aware Super PO Box 1229 WOLLONGONG NSW 2500**. If you have any questions, please call us on **1300 650 873**.