

# Investment Choice TelstraSuper RetireAccess



Complete this form to update your investment details.

RED SECTIONS FOR YOUR INFORMATION

GREY SECTIONS TO FILL OUT

Save time! Complete in **SuperOnline**

## Before you start

We recommend that you read the **TelstraSuper RetireAccess Product Disclosure Statement** to understand the risks and implications of changing your investment options and applying the Cash Allocation and Automatic Investment Re-weight features. A buy-sell spread may apply.

- To make any changes to your investments you must complete **sections 1 & 4**.
- **Retirement income stream members:** To update your investment choice, apply/continue the Cash Allocation feature and/or update where your income is drawn from complete **section 2a**.
- **Transition to retirement members:** To update your investment choice and/or where your income is drawn from complete **section 2b**.
- To apply the Automatic Re-weight function complete **section 3**.

If you would like to change your investment option using dollar amounts please log in to your SuperOnline account or call us on **1300 033 166** for a form to be sent to you.

If you're signing this form on behalf of another person, you will need to complete and attach an Authorised Third Party Representative Identification form available at [telstrasuper.com.au/forms](http://telstrasuper.com.au/forms) and include any certified documents as required.

### Important information

Investment switch instructions using this form will be processed using the unit price declared for the day we process this form (processing times may vary).

## 1. Your details currently held by TelstraSuper

Title      Mr      Mrs      Miss      Ms      Other

Surname\*

Member number\*

Given name(s)\*

Date of birth\*

Residential address\* (PO Box not acceptable)

Suburb\*

State\*

Postcode\*

Mobile/contact no.\*

Email\*

### \* Mandatory fields

Note: If you're a current member we'll be unable to process this form if your contact or personal details are different to the details we currently hold for you. To check and/or update your details before you submit this form you can:

- log into your SuperOnline account, or
- call us on 1300 033 166, or
- complete a **Change of contact details** form to update your contact details or a **Change of member details** form to update your personal details available at [telstrasuper.com.au/forms](http://telstrasuper.com.au/forms) and submit it with this form.

YOUR  
BASIC  
INFO



### Before you act

You may wish to consult an adviser before you make any decisions relating to your financial affairs. To speak with an adviser from TelstraSuper Financial Planning call **1300 033 166**.

## 2. Investment details

- Retirement income stream members complete **section 2a**
- Transition to retirement members complete **section 2b**

Your income drawdown shows your last nominated drawdown strategy. When there's insufficient funds in one of your nominated drawdown investment options, we will withdraw the funds available from that investment option and the shortfall will be drawn proportionately from your other nominated drawdown investment options. If you only have the one nominated drawdown investment option, funds will be drawn first from your nominated investment option then proportionately from all your investment options.

### 2a. Retirement income stream

- Complete this section to change how your super is invested and/or update where your income is drawn from and/or turn the Cash Allocation feature on or off.
- If you currently have the Cash Allocation feature applied to any Lifestyle investment options and wish it to continue you must tick Yes, otherwise it will be turned off. For more information about the Cash Allocation feature read the **TelstraSuper RetireAccess Product Disclosure Statement** available at [telstrasuper.com.au/pds](http://telstrasuper.com.au/pds)
- We recommend you review your income drawdown allocation and confirm the investment options you would like to draw your income from. If you do not confirm, your existing drawdown nomination will apply.

Investment options	Update investment allocation %	Update income drawdown allocation	Cash Allocation feature
	Your investment allocation must total 100%.	I would like my income drawn proportionately across my investment options.	Tick YES to apply/continue this feature
		<b>OR</b>	
		I nominate my income to be drawn as outlined below	
<b>Lifestyle options</b>			
Lifestyle Growth	%	%	YES
Lifestyle Balanced	%	%	YES
Lifestyle Moderate	%	%	YES
Lifestyle Conservative	%	%	YES
<b>Other options</b>			
High Growth	%	%	
International Shares	%	%	
Australian Shares	%	%	
Property	%	%	
Diversified Bonds and Credit	%	%	
Cash	%	%	
<b>Total (must equal 100%)</b>	<b>%</b>	<b>%</b>	

### 2b. Transition to retirement

- Complete this section to change how your super is invested and/or update where your income is drawn from.
- We recommend you review your income drawdown allocation and confirm the investment options you would like to draw your income from. If you do not confirm, your existing drawdown nomination will apply.

Options	Update investment allocation %	Update income drawdown allocation
	Your investment allocation must total 100%.	I would like my income drawn proportionately across my investment options.
		<b>OR</b>
		I nominate my income to be drawn as outlined below
High Growth	%	%
Growth	%	%
Balanced	%	%
Moderate	%	%
Conservative	%	%
International Shares	%	%
Australian Shares	%	%
Property	%	%
Diversified Bonds and Credit	%	%
Cash	%	%
<b>Total (must equal 100%)</b>	<b>%</b>	<b>%</b>

### 3. Automatic Investment Re-weight

If you invest across more than one investment option your initial percentage split may change over time due to variable investment performance. To keep your percentage split close to your initial selection you may wish to apply the Automatic Investment Re-weight facility and specify the deviation tolerance, i.e. the amount you are happy for it deviate from that split.

**Note:** The re-weight function can have implications for your investment options and income drawdown. The Automatic Investment Re-weight will not apply to any Cash Allocation feature available through the Lifestyle investments. Before you choose to apply it, it is important that you read the **TelstraSuper RetireAccess Product Disclosure Statement** available at [telstrasuper.com.au/pds](http://telstrasuper.com.au/pds)

#### Automatic Investment Re-weight

Do you want to add or update an Automatic Investment Re-weight facility using the investment allocation you've nominated in this table?†

- No
- Yes (complete details below)

#### Deviation tolerance percentage

Specify the tolerance you want to apply (between 1 - 10%).  
If no tolerance is specified, it will default to 5%.

%

Your automatic investment re-weight will not occur if the investment allocation is within the deviation tolerance.

† If you have an existing Automatic Investment Re-weight facility and you wish to have it align with the investment options nominated in the table you must tick Yes, otherwise your existing automatic investment re-weight will be cancelled.

#### Re-weight frequency

You must nominate the frequency of your automatic investment re-weight.

- Quarterly (28 March, 28 June, 28 September and 28 December)
- Half-yearly (28 June and 28 December)
- Annually (28 June)

AUTO  
RE-WEIGHT?  
↓

### 4. Your declaration and signature

Read this declaration before you sign and date this form.

- I have read and understood the information in the **TelstraSuper RetireAccess Product Disclosure Statement** and understand the risks and other implications of selecting and changing my investment options and/or applying/continuing the Cash Allocation and Automatic Investment Re-weight features.
- I understand that a buy-sell spread may apply.
- I understand that if this form has not been completed correctly, my request may not be accepted.
- I understand once this form has been received it cannot be cancelled, amended or reversed, although I can make another investment choice request.
- I acknowledge that I've read and understood the information in the 'Important information' section of this form
- I acknowledge that I have read the Privacy Policy and Privacy Collection Statement and I understand and consent to how TelstraSuper will use my personal information.

Each person who signs this form on behalf of the applicant named in this form:

- represents and warrants that they are lawfully appointed as guardian, administrator or attorney (as applicable), and
- declares that they are acting in accordance with the terms of the relevant power of attorney, guardianship order or administration order, including that if more than one person must act under the appointing document, all nominated persons must include their name, signature and date on this form below, and
- declares that their appointment remains valid and current as at the date of this form.

State your capacity (if applicable):      Guardian      Administrator      Attorney

Name

Signature

Date

SIGN  
HERE  
↓



**Please upload completed form via your SuperOnline account or return it to:**

PO Box 14309, MELBOURNE VIC 8001

Telstra Super Pty Ltd, ABN 86 007 422 522, AFSL 236709, is the trustee of the Telstra Superannuation Scheme ABN 85 502 108 833 (TelstraSuper).  
Telephone 1300 033 166 Website [telstrasuper.com.au](http://telstrasuper.com.au)

Telstra Super Pty Ltd complies with the Privacy Act 1988 (Cth). For further information on privacy visit our website at [telstrasuper.com.au](http://telstrasuper.com.au) to download a copy of our Privacy Policy and Privacy Collection Statement.

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