

Investment Choice



Complete this form to change your investment option.

RED SECTIONS FOR YOUR INFORMATION

GREY SECTIONS TO FILL OUT

Save time! Complete in **SuperOnline**

Before you start

We recommend that you read the relevant **Product Disclosure Statement** and **Investment Guide** to understand the risks and implications of changing your investment options. A buy-sell spread may apply, refer to the **Additional Information About Your Super Guide** for more information.

If you have a *TelstraSuper RetireAccess*[®] account and wish to change your investment option(s), please use the **Investment Choice TelstraSuper RetireAccess** form available at telstrasuper.com.au/forms

Effective dates for investment option changes

By using this form to make an investment switch, we consider your investment switch received once it's been entered into our administration system (rather than when you email it, deliver to us by post, in person or via a financial planner).

If we receive your request before 5.30pm on any Melbourne business day, the switch will be transacted using that day's declared unit price. Unit prices for a particular day are declared on the following Melbourne business day. If your switch request is received after 5.30pm the switches will be transacted using the first business day after such processing.

The quickest way to make an investment switch is by logging in to *SuperOnline* as we consider an investment switch request transacted in this way as received as soon as it is submitted online.

1. Your details

| | | | | | | |
|---------------------|-----------------------------|------------------------------|-------------------------------|-----------------------------|--------------------------------|----------------------|
| Title | <input type="checkbox"/> Mr | <input type="checkbox"/> Mrs | <input type="checkbox"/> Miss | <input type="checkbox"/> Ms | <input type="checkbox"/> Other | <input type="text"/> |
| Surname | <input type="text"/> | Member number | <input type="text"/> | | | |
| Given name(s) | <input type="text"/> | Date of birth | <input type="text"/> | | | |
| Residential address | <input type="text"/> | | | | | |
| Suburb | <input type="text"/> | State | <input type="text"/> | | | |
| | | Postcode | <input type="text"/> | | | |
| Mobile | <input type="text"/> | Daytime contact no. | <input type="text"/> | | | |
| Email address | <input type="text"/> | | | | | |

YOUR
BASIC
INFO



2. Investment choice

Make your investment choice

You must provide instructions for the following steps:

Step 1: Your current balance, and

Step 2: Your future contributions (unless you have an Automatic Investment Re-weight facility).

Please write the percentage of your super account balance you wish to invest beside each elected option on the table over the page.

If you invest across more than one investment option, your initial percentage split may change over time due to investment market movements and transactions on your account.



We're here to help

Need help you with your investment choice? Advice is available over the phone at no additional cost as part of your membership, call us on **1300 033 166**.

2. Investment choice (continued)

Step 1: Your current account balance

Do not change the way my current account balance is invested including any Automatic Investment Re-weight facility I may currently have in place (go to Step 2)

OR

Change my current account balance to be invested as follows:

| Option | Percentage allocation % |
|---|-------------------------|
| Growth | <input type="text"/> % |
| Balanced | <input type="text"/> % |
| Diversified Income (minimum \$100,000*) | <input type="text"/> % |
| Defensive Growth | <input type="text"/> % |
| Conservative | <input type="text"/> % |
| International Shares | <input type="text"/> % |
| Australian Shares | <input type="text"/> % |
| Property | <input type="text"/> % |
| Fixed Interest | <input type="text"/> % |
| Cash | <input type="text"/> % |
| MySuper [†] | <input type="text"/> % |
| Total (must equal 100%) | = 100% |

Automatic Investment Re-weight

If you choose to nominate an Automatic Investment Re-weight facility, your future contributions profile will automatically be updated to match your investment allocation and you do not need to complete Step 2.

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%.

%

Reweight 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)

* If you do not currently have funds invested in the Diversified Income option, the percentage allocation must be equivalent to a dollar value of \$100,000 or greater.

[†] TelstraSuper's MySuper arrangement is the default investment strategy for accumulation members and consists of three investment stages: MySuper Growth for members aged under 45, MySuper Balanced for members aged 45 to under 65, and MySuper Conservative for members aged 65 and over. By selecting MySuper on this form, your super will be invested in the relevant age-based investment stage and, as you age, will automatically be moved to the next applicable investment stage within the arrangement, without incurring a buy-sell spread.

[‡] 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.

Step 2: Your future contributions

If you do not have an Automatic Investment Re-weight facility you MUST select one option to enable your request to be processed.

Do not change the way my future contributions are invested (this means your future contributions will be invested in accordance with your previous investment strategy) OR

Change the way my future contributions are invested as per the allocation in Step 1 OR

Change my future contributions to be invested as follows:

| Option | Percentage allocation % |
|---|-------------------------|
| Growth | <input type="text"/> % |
| Balanced | <input type="text"/> % |
| Diversified Income (restrictions apply [†]) | <input type="text"/> % |
| Defensive Growth | <input type="text"/> % |
| Conservative | <input type="text"/> % |
| International Shares | <input type="text"/> % |
| Australian Shares | <input type="text"/> % |
| Property | <input type="text"/> % |
| Fixed Interest | <input type="text"/> % |
| Cash | <input type="text"/> % |
| MySuper [†] | <input type="text"/> % |
| Total (must equal 100%) | = 100% |

[†] You may only allocate future contributions to the Diversified Income option if you currently have funds invested in this option.

[‡] TelstraSuper's MySuper arrangement is the default investment strategy for accumulation members and consists of three investment stages: MySuper Growth for members aged under 45, MySuper Balanced for members aged 45 to under 65, and MySuper Conservative for members aged 65 and over. By selecting MySuper on this form, your super will be invested in the relevant age-based investment stage and, as you age, will automatically be moved to the next applicable investment stage within the arrangement, without incurring a buy-sell spread.

3. Multiple account holders (if applicable)

Only complete if you have more than one account with TelstraSuper (excluding a *TelstraSuper RetireAccess* account)

- Apply this investment choice across all of my TelstraSuper accounts, except *TelstraSuper RetireAccess*
- Apply this investment choice to account number

If you have more than one account and wish to apply different investment choices to each of your accounts, you will need to complete an **Investment Choice** form for each account.

Members requiring an investment change to an income stream must complete an **Investment Choice TelstraSuper RetireAccess** form.

4. Your declaration and signature

Read this declaration before you sign and date this form.

I declare:

- I have read and understood the information in the relevant **Product Disclosure Statement** and **Investment Guide** and understand the risks and other implications of selecting and changing my investment options.
- 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 'Effective dates for investment option changes' section of this form.
- I understand that if I make an investment choice and switch all or part of MySuper account balance to a different investment option(s), all the benefits of my TelstraSuper membership including my insurance cover will continue unchanged. I'm aware that TelstraSuper's legal obligations regarding how the MySuper arrangement is managed are different to those for TelstraSuper's other investment options. The superannuation laws specific to the MySuper arrangement are intended to ensure the Trustee has greater responsibility for those members who don't make an investment choice.

Signature X

Date

SIGN
HERE



Please return completed form to TelstraSuper:

PO Box 14309, MELBOURNE VIC 8001 or email contact@telstrasuper.com.au

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).
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