

# 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 haven't made an investment choice since you joined TelstraSuper, you would have automatically been defaulted into TelstraSuper's MySuper arrangement. If you choose to invest in one or more of the other investment options, you will cease to be fully invested in a MySuper arrangement, which means that your account balance will not be automatically transferred to the relevant MySuper investment stage as you age.
- 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](http://telstrasuper.com.au/forms)
- 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.

### Dates for investment option changes

Investment option switch instructions received **before 5.30pm** on a Melbourne business day will be transacted at the unit price declared for that day. Switch instructions received **after 5.30pm** on a Melbourne business day will be transacted at the unit price declared for the next Melbourne business day. Please note that the unit price for any given Melbourne business day is declared on the following Melbourne business day.

## 1. Your details currently held by TelstraSuper

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

\* Mandatory fields

**Note:** We'll be unable to process this form if your contact or personal details are different to those we currently hold for you. To check and/or update your details before you submit this form you can:

- log into *SuperOnline*, 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.

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### 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 choice

### Make your investment choice

You must provide instructions for the following steps:

**Step 1:** Your current balance. You can invest 100% of your super in TelstraSuper's MySuper\* arrangement **OR** in one or more of the investment options listed below.

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

If you invest one or more of the investment options below:

- write the percentage of your super account balance you wish to invest beside each elected option below and on the table over the page
- your initial percentage split may change over time due to investment market movements and transactions on your account.

### 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**

**100% in MySuper\*** (go to section 3)

**OR**

Change my current account balance to be invested as follows:

Investment options	Percentage allocation %
Growth	<input type="text"/> %
Balanced	<input type="text"/> %
Diversified Income	<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"/> %
<b>Total (must equal 100%)</b>	<b>= 100%</b>

### 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?<sup>†</sup>

- 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)

\* 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. If you are fully invested in MySuper, 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. However, if you choose to invest only partly in MySuper, your account balance will not be automatically transferred to the relevant MySuper investment stage.

<sup>†</sup> 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.

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## 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:

Investment options	Percentage allocation %
Growth	<input type="text"/> %
Balanced	<input type="text"/> %
Diversified Income	<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"/> %
<b>Total (must equal 100%)</b>	<b>= 100%</b>

## 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.

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## 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 'Dates for investment option changes' section of this form.
- I understand that TelstraSuper will not process this form if my personal details differ from the details that TelstraSuper holds and will not be responsible for the delay or other consequences due to the details not matching.
- I understand that, from time to time TelstraSuper may contact me to request additional information and to verify my instructions on 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.

Each person who signs this form as a guardian, administrator or attorney for the applicant named in this form represents and warrants by signing this form that he or she has been lawfully appointed as guardian, administrator or attorney (as the case may be) for the applicant and that appointment remains valid and current at the date hereof and has not been revoked.

Signature X

Date

State capacity (if applicable)  Guardian  Administrator  Attorney

SIGN  
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**Please return completed form to TelstraSuper:**

PO Box 14309, MELBOURNE VIC 8001 or email [contact@telstrasuper.com.au](mailto: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).  
Telephone 1300 033 166 Website [telstrasuper.com.au](http://telstrasuper.com.au)

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