

## Fixed Term Investment application

Use this form to switch some of your account balance from your existing investment options into a Fixed Term Investment. The minimum investment is \$20,000, and you can invest up to 80% of your accumulation account balance in the Fixed Term Investment. Please read the Important Notes before completing this form.



The investment dates are: 1 March, 1 June, 1 September and 1 December.

You must return this form **by 5pm Sydney time on the sixth business day before the investment date** for this form to be accepted.

### Your personal details

Member Number	Surname	Given names
<input type="text"/>	<input type="text"/>	<input type="text"/>
Postal address		
<input type="text"/>		
Date of birth	Daytime phone number/Mobile number	Email address
<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/>	<input type="text"/>

### Investment details

You can invest a dollar amount OR a percentage of your current account balance in the Fixed Term Investment. Please select an option below.

**Invest a DOLLAR AMOUNT of your account balance**  
(minimum of \$20,000)

To be withdrawn as follows:

Withdraw pro-rata from current balances in each option  
Pro-rata amount  \$

OR

Withdraw from existing balances as listed below:

MySuper	<input type="text"/> \$ <input type="text"/>
Cash	<input type="text"/> \$ <input type="text"/>
Cash Enhanced	<input type="text"/> \$ <input type="text"/>
Conservative	<input type="text"/> \$ <input type="text"/>
Moderate	<input type="text"/> \$ <input type="text"/>
Indexed Diversified	<input type="text"/> \$ <input type="text"/>
Balanced	<input type="text"/> \$ <input type="text"/>
Growth	<input type="text"/> \$ <input type="text"/>
Growth MVP	<input type="text"/> \$ <input type="text"/>
International Shares	<input type="text"/> \$ <input type="text"/>
Australian Shares	<input type="text"/> \$ <input type="text"/>

OR

**Invest a PERCENTAGE of your account balance**  
(up to 80% of your account balance)

Specify percentage:  %



This will be withdrawn pro-rata from monies that are currently held in one or more of the above investment options (excluding any other Fixed Term investment held in the Fund).

### Member's declaration

I confirm that I have all the information I require to make an informed investment decision (including the interest rate for the next 12-month term). Understanding the risks that are involved with investment choice, I wish to transfer the above amount to the Fixed Term Investment option on the next investment date. I understand and accept that I may not be able to withdraw or switch the investment and if, for any reason, my investment is not held until the end of the term, I may not receive any interest (including for the period prior to redemption).

Signature	<input type="text"/>
Date	<input type="text"/> / <input type="text"/> / <input type="text"/>



You must return this form **by 5pm Sydney time on the sixth business day before the investment date** for this form to be accepted.

**EMAIL**  
info@maritimesuper.com.au

**FAX**  
(02) 9261 3683

**POST**  
Maritime Super  
Locked Bag 2001  
QVB Post Office NSW 1230

## Important notes

### About investment switching

You can change investment options for all or part of your existing account balance and/or your future contributions. This is known as 'investment switching'.

Switches take effect on the Wednesday of each week and will only be implemented on receipt of a correctly completed *Investment switching form* before 5pm Sydney time on the preceding Sunday. The Trustee may nominate an alternative day to process a switch request and may delay or suspend switches at its discretion.

We allow a maximum of 12 switches per year per member free of charge.

Once a switch has been completed, we'll send you a letter confirming this and how much has been switched.

### Maritime Super's investment options

Everyone's circumstances and financial goals are different. That's why Maritime Super offers a range of investment options - both diversified and sector options, each with their own unique investment objective and risk profile.

You can invest in one, or any combination, of the investment options – it's completely up to you. However, it's important to consider your investment objectives and tolerance to risk when deciding on your investment strategy.

A financial planner can help you to work out your investment timeframe and risk tolerance, and then determine an appropriate investment option to suit your needs. Call Member Services to make an appointment with a financial planner.

To learn more about our investment options, refer to the *Investments Supplement* or visit the Investments section of our website at [www.maritimesuper.com.au](http://www.maritimesuper.com.au).

### The Fixed Term Investment option

The Fixed Term Investment option provides a predetermined interest rate net of fees and any tax on investments held for a 12-month term. It is offered on a quarterly basis (on 1 March, 1 June, 1 September and 1 December), with the rate of return published on the Maritime Super website 2-3 weeks before each investment date. The predetermined interest rate will only apply if the investment is held to the end of the 12-month term. Early access before the end of the term is generally limited to situations required by super law or in exceptional circumstances.

### Privacy statement

Maritime Super collects your personal information to effectively administer your superannuation account and respond to your requests. The Fund takes all reasonable steps to protect your privacy and the confidentiality of your personal information but may disclose your personal information to other parties, such as the Administrator, insurers, service providers, or as required by law. The Trustee and Maritime Financial Services Pty Limited (MFS) (the Administrator) are bound by the 'Australian Privacy Principles' prescribed in the Privacy Act 1988 which regulate how the Trustee and MFS may collect, use and disclose members' details. Information about how Maritime Super uses and discloses the personal information that you provide is contained in the Trustee's Privacy Policy. To access this Policy visit the website at [www.maritimesuper.com.au](http://www.maritimesuper.com.au) or to access your personal details call Member Services on 1800 757 607.



#### Jump online to learn more about investing and our investment options

Our website at [www.maritimesuper.com.au](http://www.maritimesuper.com.au) has a wealth of information regarding investments and the investment options available to you.

Visit the 'Investments' section of our website to learn all about our investment options, investment approach and performance.

Visit the 'Resources' section to download the *Investments supplement*, watch a video or read a fact sheet about investing.