

## Variation of investment options - pensions

Complete this form if you are an Allocated Pension, Working Income Support Pension or Term Allocated Pension member and you wish to change your investment options. Please read the Important Notes before completing this form.



Return this completed form before 5pm Sydney time on the preceding Sunday for the switch to take effect the following Wednesday.

**EMAIL**

info@maritimesuper.com.au

**FAX**

(02) 9261 3683

**POST**

Maritime Super  
Locked Bag 2001  
QVB Post Office NSW 1230

### Your personal details

Member Number

(Tick if applicable) Please apply this investment switch to all of my accounts

If you wish to specify which accounts to apply this switch to, list all Member Numbers below




Surname

Given names

Postal address

Date of birth

 /  / 

Daytime phone number/Mobile number

Email address

### Switch your investments

This form does not include amounts in the Fixed Term Investment option. If you wish to invest in the Fixed Term Investment option (you can invest up to 80% of your account balance in this option), complete the *Fixed Term Investment Application* which is available from our website or by calling Member Services.



Your investment choice across one or more options must add up to 100%.

How much of your account do you wish to switch?

My total account balance OR  A percentage of my total account balance (specify percentage)  %

#### Switch my investments into the following investment options as follows:

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

Do you wish to have your pension payments drawn from a particular investment option? If so, specify percentages below.

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

If no option is selected, your funds will be drawn from your balances on a pro-rata basis.

### Member's declaration

I confirm that I have read the Important Notes and have all the information I require to make an informed decision. Understanding the risks that are involved with investment choice, I wish to transfer the above amounts between and to the investment options I have selected.

I understand that switches are processed on a weekly basis generally every Wednesday, and any form received by 5pm Sydney time on a Sunday will be processed the following Wednesday using unit prices which are based on valuations at close of business Wednesday.

Signature

Date

 /  /

## 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).

### 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.