

# Change your investment options



Did you know that you can update your investment options online? Log in to Member Online at [login.aware.com.au](http://login.aware.com.au).

Use this form if you want to make a change to the investment options in your Aware Super account.

## Important information

- Once you submit a change of investment options request, it cannot be cancelled.
- If we receive your form by 3pm AEST/AEDT, that day's unit prices will be applied, provided there is no previously submitted change of investment options or Term Deposit application pending. If there is a pending request, the new request will take effect the business day following the completion of processing the first request. It will generally take two business days to process a request.
- If we receive this form and a *Term Deposit application* form on the same day by 3pm, the *Term Deposit application* will be processed first, unless you provide us with clear instructions to do otherwise. This means that the *Change your investment options* form will not be processed until the Term Deposit application has been processed, which generally takes up to three business days.
- For more information on your investment options please refer to the applicable *Aware Super Product Disclosure Statement (PDS)* and *Handbooks* at [aware.com.au/pds](http://aware.com.au/pds).

Please use a dark pen and CAPITAL letters. Insert (X) when you have to choose an option. If you have any questions, please contact our Member Support Team on **1300 650 873**.



\* Indicates that providing this information is mandatory. Not doing so may delay the processing of your request.

## Step 1: Your personal details

Product

☐ Future Saver

☐ Retirement Income

☐ Term Allocated Pension (TAP)

☐ Retirement Transition

Account number\*

Member number

Title

Date of birth\*

First name\*

Middle name

Last name\*

Home address\* (must not be a PO Box)

Suburb\*

State\*

Postcode\*

Mobile number\*

Daytime contact number

Email\* (Providing a personal email address rather than a work email address ensures we can contact you even if you change employers.)

By providing my email address I'm consenting to receive communications from Aware Super digitally as appropriate and in accordance with Aware Super's Privacy Policy. I understand I can change my communication preferences at any time by logging into Member Online or calling Aware Super on **1300 650 873**.

## Step 2: MySuper Lifecycle strategy

### Future Saver accounts only

For more information on the MySuper Lifecycle strategy and how your super will be invested, please refer to the 'How we invest your money' section of the *Aware Super Future Saver PDS*.

If you do not make an investment choice, you will be automatically invested in the MySuper Lifecycle strategy.

**Please select (X) one of the options below:**

- ☐ I would like to invest (opt in) in MySuper Lifecycle.
- ☐ I would like to opt out of MySuper Lifecycle. (I understand that my current investment options will not change, unless I elect to change these in the future.)

## Step 3: Change your investment options

You may change how your current account balance is invested and/or how your future contributions (for Future Saver accounts only) are invested.

Please indicate your product and investment choices:

- ☐ **Future Saver account**

Investment options	Investment choice (%)		
	Account balance and future contributions	Account balance only	Future contributions only
	Diversified options		
High Growth	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
High Growth Socially Conscious	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
High Growth Indexed	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Balanced Socially Conscious	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Balanced Indexed	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Defensive	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
	Single asset class options		
Australian Shares	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
International Shares	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Property	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Bonds	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Cash	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
<b>Total</b> (must add up to 100%)	<input type="text"/> <b>1</b> <input type="text"/> <b>0</b> <input type="text"/> <b>0</b> %	<input type="text"/> <b>1</b> <input type="text"/> <b>0</b> <input type="text"/> <b>0</b> %	<input type="text"/> <b>1</b> <input type="text"/> <b>0</b> <input type="text"/> <b>0</b> %



Please complete one column only for the account type you are opening.

### Step 3: Change your investment options (continued)

☐ For Retirement Income, Retirement Transition and Term Allocated Pension accounts

Investment options	Account balance (percentage %)	
	Retirement Income	Retirement Transition
	Diversified options	
High Growth	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
High Growth Socially Conscious	Not available	<input type="text"/> <input type="text"/> <input type="text"/> %
High Growth Indexed	Not available	<input type="text"/> <input type="text"/> <input type="text"/> %
Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Balanced Socially Conscious	Not available	<input type="text"/> <input type="text"/> <input type="text"/> %
Balanced Indexed	Not available	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative Balanced	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative Balanced Socially Conscious	<input type="text"/> <input type="text"/> <input type="text"/> %	Not available
Conservative Balanced Indexed	<input type="text"/> <input type="text"/> <input type="text"/> %	Not available
Conservative	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative Socially Conscious	<input type="text"/> <input type="text"/> <input type="text"/> %	Not available
Conservative Indexed	<input type="text"/> <input type="text"/> <input type="text"/> %	Not available
Defensive	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
	Single asset class options	
Australian Shares	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
International Shares	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Property	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Bonds	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
Cash	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> %
<b>Total</b> (must add up to 100%)	<input type="text" value="1"/> <input type="text" value="0"/> <input type="text" value="0"/> %	<input type="text" value="1"/> <input type="text" value="0"/> <input type="text" value="0"/> %



You only need to complete this step if you have selected more than one investment option at Step 3.

## Step 4: Choose your payment order

### Retirement Income, Retirement Transition and Term Allocated Pension members only

You cannot receive income payments from funds invested in a Term Deposit. For further details about choosing your payment order, read the relevant PDS at [aware.com.au/pds](http://aware.com.au/pds).

#### Options

Please select (X) one of the options below:

☐ The default order – refer to the relevant PDS for the default order at [aware.com.au/pds](http://aware.com.au/pds).

OR

☐ The same proportions as my investment options in Step 3 (this option is not available if you hold a Term Deposit).

OR

☐ Pro-rata – Your payment will be deducted in the same proportions as your investment options at the time we process this instruction.

OR

☐ In the following order/percentages (eg  or   %)

Investment options	Retirement Income and TAP		Retirement Transition	
	Order (eg 1,2,3)	Percentage (%)	Order (eg 1,2,3)	Percentage (%)
Cash	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
Bonds	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
Defensive	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative Indexed	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %		Not available
Conservative	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative Socially Conscious	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %		Not available
Conservative Balanced Indexed	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %		Not available
Conservative Balanced	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
Conservative Balanced Socially Conscious	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %		Not available
Balanced Indexed		Not available	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
Balanced	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
Balanced Socially Conscious		Not available	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
High Growth Indexed		Not available	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
High Growth	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
High Growth Socially Conscious		Not available	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
Property	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
Australian Shares	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
International Shares	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> %
<b>Total</b> (must add up to 100%)		<input type="text" value="1"/> <input type="text" value="0"/> <input type="text" value="0"/> %		<input type="text" value="1"/> <input type="text" value="0"/> <input type="text" value="0"/> %

## Step 5: Rebalance your investment option allocation

Rebalancing allows you to realign your account balance with your investment choice effective 15th July each year. It is only applicable if you have selected more than one investment option.

The annual rebalancing feature will apply to the investment options selected for your **account balance** only and excludes term deposits. It will **not** change the future contribution investment option mix you have chosen if these option/s are different to the investment choice in place for your account balance. If you hold a term deposit at 15th July, only funds invested in non-term deposit investment options will be rebalanced in-line with your chosen mix of investment options

**Please select (X) one of the options below:**

- ☐ Rebalance my account on 15th July each year as per my investment choice in Step 3.
- ☐ Cancel my existing instruction to rebalance my account on 15th July each year.

## Step 6: Read our privacy information

The personal information provided on this form is collected and held by Aware Super, in accordance with the Australian Privacy Principles of the *Privacy Act 1988* (Cth), for the purpose of administering accounts, assessing claims and providing services associated with fund membership. For further information about how personal information is handled, please call us on **1300 650 873** or visit **[aware.com.au/privacy](https://www.aware.com.au/privacy)** to view the privacy policy (a hard copy of the policy may also be provided on request). The policy contains information about access to and correction of personal information, how a complaint can be made about a privacy breach and other important information about how personal information is collected, used and disclosed.

## Step 7: Declaration

I declare that:

- I have read and understood the information on this form and information in the relevant *Aware Super Product Disclosure Statement* and the *Handbooks* (Future Saver members only) about investment options.
- I wish to have my account balance (excluding any term deposits) and/or future contributions invested in the investment options I have nominated.
- If I have made an account balance investment choice only at Step 3 – I direct that my future contributions continue to be applied to the investment option/s (and in such proportions) my contributions are currently deposited into until such time that I make a new future contribution nomination (Future Saver members only).
- If I have made a future contributions investment option nomination only at Step 3 – I direct that my existing account balance should remain invested in the investment option/s in which it is currently invested (Future Saver members only).
- I understand that all contributions and rollovers received on or after the effective date of the change will be allocated in accordance with my future contributions investment option nomination (Future Saver only).
- I understand that my change of account balance investment choice will apply to my whole account balance (excluding any monies held in an existing Term Deposit) unless I have elected different investment options for my future contributions.
- I understand that if the request is received by the trustee before 3pm AEST/AEDT, the request will usually be processed using that same day's unit price; if received after 3pm AEST/AEDT it will be treated as having been received the following business day (before 3pm AEST/AEDT) and therefore receive the next business day's unit price.
- I understand that my choice of investment options is irrevocable and binding until I choose other investment options which will become effective at a later date.
- I understand that I cannot submit another change of investment option request or Term Deposit application until this change has been processed (generally up to three business days).
- I have read, understood and accept the Aware Super privacy policy.

Signature\*

Date signed\* (DD-MM-YYYY)

D

D

M

M


Y

Y

Y

Y

 Please sign and date form here.

 Post the form to this address.

## Step 8: Where to post your completed form

Please post the completed form to:

**Aware Super**  
**GPO Box 89**  
**MELBOURNE VIC 3001**

In case you need any further assistance, please contact our Member Support Team on **1300 650 873**.

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