

Change of investment option form

For Super members

Please use **BLOCK LETTERS** and **black ink**.

Send your completed form to:

Australian Ethical Super, Locked Bag 20013,
Melbourne VIC 3001

Email: advisers@australianethical.com.au
or login to the member portal at
australianethical.com.au/login and upload the
completed forms under the 'Contact Us' tab.

Step 1: Member details

Member number

Title

Mr Mrs Ms Miss Other, please specify

Full given name(s)

Date of birth (DD/MM/YYYY)

Surname

Step 2: Switching your super investment options

Select your desired super option or spread of options.

Options	Existing account balance	Future contributions strategy
No change	<input type="text" value=""/>	<input type="text" value=""/>
Defensive	<input type="text" value=""/>	<input type="text" value=""/>
Conservative	<input type="text" value=""/>	<input type="text" value=""/>
Balanced (accumulation)	<input type="text" value=""/>	<input type="text" value=""/>
High Growth	<input type="text" value=""/>	<input type="text" value=""/>
Growth	<input type="text" value=""/>	<input type="text" value=""/>
International Shares	<input type="text" value=""/>	<input type="text" value=""/>
Australian Shares	<input type="text" value=""/>	<input type="text" value=""/>
TOTAL*	100%	100%

* Ensure that your investment selections total 100% and that each option is in whole percentages.

Step 3: Signature

Before making a decision consider its appropriateness to your circumstances and read the product disclosure statement (PDS), available at australianethical.com.au/super/pds. You may wish to seek independent financial advice from a licensed or authorised financial adviser before making an investment decision.

I declare that:

- The details that I have provided are true and correct.
- I am aware that I may ask my superannuation provider for information about any fees or charges that may apply, or any other information about the effect this transaction may have on my benefits, and do not require any further information.
- I have received, read, and agree to the terms outlined in the **Australian Ethical Super Product Disclosure Statement (PDS)** and the **Privacy Collection Notice**.
- I authorise Australian Ethical Super to give effect to this request.
- I am aware that if I requested an investment switch while another transaction is being processed (such as a contribution), the switch will not be processed until after the first transaction is finished. This can take up to an additional 2 business days, and the unit price for the switch will be the processed date (not the date I requested the switch).
- I have read and accept the following privacy collection notice Personal information is collected by and held for Australian Ethical by its administrator in accordance with the Privacy Act 1988 (Cth), for the purpose of administering accounts, providing services associated with those accounts and may be used for marketing and research purposes. Without this information we would not be able to provide our services to you. You can opt out of receiving marketing material at any time by calling us or notifying us via email. Your personal information may be disclosed to third party service providers (some of which may be located overseas) or otherwise as permitted by law. For further information about how personal information is handled, our complete privacy policy can be viewed at australianethical.com.au/privacy-policy (a hard copy of the policy can be provided on request). You can also contact us at privacy@australianethical.com.au for any queries.

I have read, understood and agree to the above declaration.

! Please note we currently do not accept electronic signatures on forms. To avoid delays or having to complete this form again, ensure you sign the documents with a wet ink signature (i.e. by hand with a black or blue ink pen).

Signature

Signatory's full name (please print)

Date (DD/MM/YYYY)

? If you have any questions, please contact Australian Ethical Super on 1800 021 227.

Australian Ethical Superannuation Pty Ltd (ABN 43 079 259 733, RSE L0001441, AFSL 526 055),
Trustee of the Australian Ethical Retail Superannuation Fund (ABN 49 633 667 743, USI/SPIN AET0100AU)

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