

# Investment Choice Form Pension Member

For Pension members previously  
with Christian Super

Complete this form if you would like to set up or change your investment option OR you can also change your investment options online, visit MemberAccess at [australianethical.com.au](http://australianethical.com.au)

We recommend you read the PDS and AIB (Pension) at [australianethical.com.au/super/pds](http://australianethical.com.au/super/pds) and consider speaking with a financial adviser before making any investment decisions.



Use this form if you were previously  
a Christian Super member.

**Send the form together with any other  
associated documentation to:**

Australian Ethical Super Locked Bag 5073  
Parramatta NSW 2124 or  
Email [members@australianethical.com.au](mailto:members@australianethical.com.au)

## Step 1: Your personal details

Member number (this can be found on your Member Statement)











Date of birth









Mr/Mrs/Ms/Rev/Other





Surname






















Given Names

























Street Number/PO Box






Street Name






















Suburb/Town

























State




Postcode







Phone [daytime]











Mobile











Email

























## Step 2: What do you want to do?

- ☐ Allocate my whole balance (100% to one investment option). **Complete step 3, option 1 – over page**
- ☐ Split my balance amongst various investment options. **Complete step 3, option 2 – over page**

### Step 3: Investment choice

❗ Please complete either option 1 below or option 2.

This Investment Choice Form allows you to select how your current balance will be invested.

**Option 1:** Tick the following investment option (select only one) you would like your whole balance invested in:

- |  |   |
|--|---|
| <input type="checkbox"/> Balanced (pension)*       | <input type="checkbox"/> Growth               |
| <input type="checkbox"/> Balanced (accumulation)** | <input type="checkbox"/> International Shares |
| <input type="checkbox"/> Defensive                 | <input type="checkbox"/> Australian Shares    |
| <input type="checkbox"/> Conservative              |   |

\* Available for account-based Pensions only

\*\* Available for Transition to Retirement (TTR) accounts only

**Option 2:** Fill in boxes below with the percentage splits, making sure each column totals to 100%

Balanced (pension)*	<input type="text"/> %
Balanced (accumulation)**	<input type="text"/> %
Defensive	<input type="text"/> %
Conservative	<input type="text"/> %
Growth	<input type="text"/> %
International Shares	<input type="text"/> %
Australian Shares	<input type="text"/> %
<b>TOTAL</b>	<b>100%</b>

❗ It is important to ensure that each column equals a total of 100% and all proportions are rounded to the nearest whole percent, otherwise your request may not be able to be processed.

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### Step 4: Choose your payment drawdown strategy

You can nominate which investment options to draw your pension payments from. If no selection is made, pension payments will be drawn proportionately from the investment options you are invested in.

Please select how you would like your pension payments to be drawn (select one option):

**Option A -** Proportionately from my investments (pro rata).

Choose this option if you would like your pension payments to be drawn proportionately from the investment options you are invested in.

**Option B -** Percentage split according to the nominated investment choice below:

Percentage split Options	Percentage*
Defensive	<input type="text"/> %
Conservative	<input type="text"/> %
Balanced (pension)**	<input type="text"/> %
Balanced (accumulation)***	<input type="text"/> %
Growth	<input type="text"/> %
International Shares	<input type="text"/> %
Australian Shares	<input type="text"/> %
<b>TOTAL</b>	<b>100%</b>

\* Please ensure that your investment selections total 100% and that each option is in whole percentages

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Once there is no longer enough money in your chosen options, your payments will be paid proportionately from your investments.

**Option C -** If you nominate a drawdown order, we will deduct payments from the first option until your investment in that option is exhausted, and then deduct payments from the second option and so on.

#### Sequential drawdown

Options	Drawdown order - number 1-6
Defensive	<input type="text"/>
Conservative	<input type="text"/>
Balanced (pension)**	<input type="text"/>
Balanced (accumulation)***	<input type="text"/>
Growth	<input type="text"/>
International Shares	<input type="text"/>
Australian Shares	<input type="text"/>

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## Step 5: Member declaration

Before switching investment options you should read the details of each investment option involved carefully. Over time, unit prices for different investment options rise and fall at different rates resulting in the proportion of your current balance in each option changing.

Please switch my current account balance and pension payments to the investment choice option(s) that are nominated on this form.

I declare that:

- I have received, read and understood all of the information that I reasonably require, in order to make an informed decision about my investment options and how to complete this form. Australian Ethical Super's Privacy Statement, Financial Services Guide, Product Disclosure Statement and Target Market Determinations are all available on [australianethical.com.au](http://australianethical.com.au) and I can contact Australian Ethical at any time if I require assistance.
- I understand the nature of risk attached to the investments I am applying for and acknowledge that neither Australian Ethical, nor the Trustee of the Fund guarantee a return of capital or the performance of my investment.
- I understand that any information provided by Australian Ethical Super is of a general or factual nature only. The information does not take into account my personal investment objectives, financial situation or particular needs. I acknowledge that Australian Ethical Super has recommended that I seek personal financial advice before making any investment decisions.
- I understand that switching investment options may incur fees, as investment fees and costs vary between options. There are no fees charged for switching your investment options. However, a buy/sell spread (the difference between entry and exit unit prices) applies on changing between some investment options. You can obtain a unit price quote (reflecting any buy/sell spreads) from the unit price section of the investments page, or you can call us on 1800 021 227
- I understand that changes to my investment options will only take place upon receipt of a validly completed form and that these instructions will supersede all previous investment elections.
- I understand that once I make an investment choice, it cannot be reversed. A further switch can be lodged which will take effect on the relevant date for that particular switch.
- 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 process date (not the date you requested the switch).
- I have read, understood and agree to the above declaration.

Your signature

X

Date

- ❗ Please note if you are using an electronic signature, this must be signed using OneSpan, DocuSign, or Adobe Acrobat Sign, and the forms will need to be accompanied by a time-stamped certificate.
- ❗ Please note this form will be invalid if unsigned and undated

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