



Hi Jesse,

We're enhancing our Advocacy investment option by adding new asset classes to make it more diverse, while continuing to offer a high growth strategy.

We've also decided to **change the name to the High Growth option and reduce the investment fee from 1 October 2021**. The new name better reflects the investment strategy of the option as it aims to deliver returns of 4.5% p.a. above CPI over the long term, while still investing in line with our Ethical Charter.

The Advocacy option is changing but rest assured that our advocacy work isn't.

Australian Ethical continues to find opportunities to advocate for change with companies that we invest in, ones that don't meet our Ethical Charter that we hold nominal holdings for, and ones we don't invest in.

We also engage with government on policy issues relating to climate and biodiversity, human rights and animal protection. You can see examples of our recent advocacy work on our website.

LATEST ADVOCACY

What's changing?

From 1 October 2021 the following changes will be in place:

- The Advocacy option will be renamed the 'High Growth option'
- We plan to invest in additional growth assets such as alternatives and unlisted property
- The investment fee will reduce from 1.20% p.a. to 0.99% p.a.
- The recommended minimum investment timeframe will increase from 7 to 10 years, with an investment objective of 4.5% p.a. above CPI (after investment fees and indirect costs)
- The risk level for the option remains High due to the continued allocation to growth assets

For further details on these changes please see the Significant Event Notice [on our website](#).

FIND OUT MORE

Why are we making these changes?

The purpose of these changes is to provide a more diversified offering with a lower investment fee, and we're changing the objective of the option to provide a better view of the long-term returns you can expect.

What do you need to do?

There's no action required on your part. The changes will take effect from 1 October 2021. If you want to review or update your investment options you can do this anytime by logging into your member portal.

Please note that an investment switch will incur a buy/sell spread. The buy sell spread ensures transaction costs involved in buying or selling of assets are fairly allocated only to those members who incurred these costs. More information on the buy/sell spread of our products is available on our [super fees information page](#).

We're here to help

If you need any help call us on **1800 021 227**
Monday to Friday 8.30am-5.30pm (AEST) or [email us](#).

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