

# Change your investments



## About this form

You can use this form to change your investment mix for your existing account balance and/or any future contributions. You can also do this online by logging into your account at [equipsuper.com.au](http://equipsuper.com.au). Information about Equip Super's investment options is available online and in our *Product Disclosure Statement* (PDS). If you nominate invalid investment options or if you provide any information that is incomplete or ambiguous in the opinion of the Trustee, your request will not be actioned. You will be advised if this is the case. If you're unsure of your decisions, we recommend that you see a licenced financial adviser.

## 1 – Your member details

Please complete in pen using CAPITAL letters

Member number

Title

Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Other ☐

Sex

Male ☐ Female ☐

Date of birth (ddmmyyyy)

First name

Last name

Postal address (must be provided)

Suburb

State

Postcode

Country (if not Australia)

Business hours phone

After hours phone

Mobile

Email

## Your investment choice options

What do you want to do?

- Change options for my existing account balance only > **Complete steps 2 and 4**
- Change options for my future contributions only > **Complete steps 3 and 4**
- Change options for both my existing account balance and my future contributions > **Complete steps 2, 3 and 4**

## Need help?



1800 682 626



[equipsuper.com.au](http://equipsuper.com.au)



Equip Super, GPO Box 4303, Melbourne VIC 3001

Issued by Togethr Trustees Pty Ltd ABN 64 006 964 049 AFSL 246383  
as trustee for Equipsuper ABN 33 813 823 017 USI 33 813 823 017 000

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## 2 – Your existing account balance

Please fill out the percentage you would like to invest in each investment option in whole percentages. The total must add up to 100%.

I'd like to invest my existing account balance in the following investment option(s):

Diversified options		Single Sector Investment options	
Growth Plus	<input type="text"/> %	Australian Shares	<input type="text"/> %
Growth	<input type="text"/> %	Overseas Shares	<input type="text"/> %
Balanced Growth	<input type="text"/> %	Diversified Fixed Interest	<input type="text"/> %
MySuper*	<input type="text"/> %	Cash	<input type="text"/> %
Balanced	<input type="text"/> %		
Capital Stable	<input type="text"/> %		
Future Focus	<input type="text"/> %		
Index Diversified	<input type="text"/> %		

**Must total 100%**

\* Please note the MySuper option is not available to you if you are a defined benefit member with an additional accumulation account.

## 3 – Your future contributions

Please fill out the percentage you would like to invest in each investment option in whole percentages. The total must add up to 100%.

I'd like to invest any future contributions in the following investment option(s):

Diversified options		Single Sector Investment options	
Growth Plus	<input type="text"/> %	Australian Shares	<input type="text"/> %
Growth	<input type="text"/> %	Overseas Shares	<input type="text"/> %
Balanced Growth	<input type="text"/> %	Diversified Fixed Interest	<input type="text"/> %
MySuper*	<input type="text"/> %	Cash	<input type="text"/> %
Balanced	<input type="text"/> %		
Capital Stable	<input type="text"/> %		
Future Focus	<input type="text"/> %		
Index Diversified	<input type="text"/> %		

**Must total 100%**

\* Please note the MySuper option is not available to you if you are a defined benefit member with an additional accumulation account.

## Effective date

If we receive your request to change your investment options prior to 4pm AEST/AEDT on a business day, the change will be effective using the unit prices applied for that day. If the request is received after 4pm AEST/AEDT on a business day, the change will be effective the following business day.

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## Privacy

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The personal information you provide on this form will be used in accordance with Togethr Trustee's Privacy Statement, which you can view online at [equipsuper.com.au/privacy](https://equipsuper.com.au/privacy) or you can obtain a copy by contacting us on **1800 682 626**.

Togethr Trustee's Privacy Collection Statement details how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It includes details on how we collect, disclose and manage your personal information, including other entities and offshore locations that may receive or provide your information.

Our administrator, Mercer Outsourcing (Australia) Pty Ltd (Mercer), will also handle your personal information. You can view Mercer's Privacy Policy online at [mercer.com.au/privacy](https://mercer.com.au/privacy)

If you have any other queries in relation to privacy issues, you can contact us or write to our Privacy Officer, GPO Box 4303, Melbourne VIC 3001.

## 4 – Sign the form

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### By signing this form I:

- confirm that I have read and understood the form including the information about when my change will be effective.
- understand the information on this form will be used to process my investment choices.
- acknowledge that Equip Super will not action my request if the information is incomplete or ambiguous.
- understand that if I am a defined benefit member with an additional account, the MySuper option is not available to me and any MySuper selections I made will be applied to the Balanced Growth investment option.

Signature

Date (ddmmyyyy)

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**Please return your completed form to Equip Super, GPO Box 4303, Melbourne Vic 3001.**

## Need help?



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