

Smartsave Change Investment Allocation Form



Please complete this form in BLOCK LETTERS. Questions? Call us on 1300 654 720 or email smartsave@diversa.com.au

Did you know?

You can make your investment switch online at www.smartsavsuper.com.au using your member number and password. (if you require your login details, please call the Member Services on 1300 654 720)

Important information

- Use this form to change the allocation of your existing account balance AND/OR the allocation of your future contributions;
- We will send you written confirmation within 30 days of receiving your completed form. If you do not receive confirmation please contact us on 1300 654 720;
- Before you complete this form, you should have read the Smartsave 'Member's Choice' Superannuation Master Plan Product Disclosure Statement, which explains the strategy of each of the investment choices; and
- Unit prices are calculated daily so your investment allocation change will occur at the unit price on the last business day in which we receive your completed form.

1 Member details

Account Number

Date of Birth

Title

Given Name(s)

Surname

Postal Address

State

Postcode

Residential Address (if same as Postal Address write "as above")

State

Postcode

Phone (home)

Phone (work)

Phone (mobile)

Email

I authorise Smartsave to update my address and contact details if the details provided above differ to the details currently held.

Form continues overleaf >

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Change investment allocation

Please select one option from each section (2A, 2B and 2C).

	SECTION 2A My Existing Balance is (\$ or %):	SECTION 2B I want my Existing Balance re-allocated to (\$ or %):	SECTION 2C I want my Future Contributions paid to (%):
	<p>This is the amount(s) (in \$ or %) which you currently have invested in each of the fourteen investment options. Select one:</p> <p><input type="checkbox"/> My existing balance allocation is shown below.</p> <p>OR</p> <p><input type="checkbox"/> I do not know my existing balance allocation. (Leave below blank)</p>	<p>This is how you want your existing balance to be allocated (in \$ or %). Select one:</p> <p><input type="checkbox"/> Please re-allocate my existing balance as shown below.</p> <p>OR</p> <p><input type="checkbox"/> Please leave my existing balance allocation unchanged. (Leave below blank)</p>	<p>This is where you want future contributions made to your account to be allocated to (in %). Select one:</p> <p><input type="checkbox"/> Please pay my future contributions as shown below.</p> <p>OR</p> <p><input type="checkbox"/> Please pay any future contributions as per the allocation shown in Section 2B. (Leave below blank)</p>
Cash			
Diversified Fixed Interest			
Managed Stable			
Balanced			
MySuper Balanced			
Growth			
High Growth			
Aust Shares - Imputation			
Diversified Property			
Australian Shares			
Global Shares			
Resources			
Aust Shares - Small Co.			
Aust Shares - Geared			
TOTAL			

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Signature

Signature

Date

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Privacy Policy - The information you are providing in this form is subject to the Privacy Amendment (Private Sector) Act 2000. The Act sets out principles for dealing with personal information which includes standards for collection, storage, accuracy and use of information and for disclosure required by the Australian Tax Office as well as your right to access your personal information which we hold. Smartsave has developed policies for complying with this legislation which you may view on request.

Please send the completed form to: Smartsave, PO Box 1282, ALBURY NSW 2640

Contact Us

Post: PO Box 1282, ALBURY NSW 2640

Email: smartsave@diversa.com.au

Phone: 1300 654 720

Website: www.smartsavesuper.com.au

Smartsave 'Member's Choice' Superannuation Master Plan is issued by Diversa Trustees Limited ABN 49 006 421 638 (AFSL No 235153 RSE Licence No L0000635) as Trustee for Smartsave 'Member's Choice' Superannuation Master Plan ABN 43 905 581 638. The Product Disclosure Statement ('PDS') is available at www.smartsavesuper.com.au or by calling 1300 654 720. This document may contain advice which is general in nature and not specific to your particular circumstances. Before making an investment decision or acting on general advice you should consider your own financial situation, the PDS and whether the particular financial product is right for you.