

# Smart Pensions Change Investment Allocation Form



Please complete this form in BLOCK LETTERS. Questions? Call us on 1300 654 720 or email [smartsave@diversa.com.au](mailto:smartsave@diversa.com.au)

## Did you know?

You can make your investment switch online at [www.smartsavesuper.com.au](http://www.smartsavesuper.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 investment option you wish your pension payments to be deducted from.
- 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 read the Smartsave 'Member's Choice' Superannuation Master Plan Product Disclosure Statement, which explains the strategy of each of the investment choices.
- Smartsave calculates unit prices 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

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

Phone (home)

Phone (work)

Phone (mobile)

Email

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

Form continues overleaf >

# 2

## 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 pension payments to be deducted from (%):
	<p>This is the amount(s) (in \$ or %) which you currently have invested in each of the seven investment options.</p> <p>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 %).</p> <p>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 the investment option you want your pension payments to be paid from (in %).</p> <p>Select one:</p> <p><input type="checkbox"/> Please pay my pension payments as shown below.</p> <p>OR</p> <p><input type="checkbox"/> Please pay my pension payments as per the allocation shown in Section 2B. (Leave below blank)</p>
Cash			
Diversified Fixed Interest			
Managed Stable			
Balanced			
Growth			
Diversified Property			
Australian Shares			
TOTAL			

### 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 Taxation 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](mailto:smartsave@diversa.com.au)

Phone: 1300 654 720

Website: [www.smartsavesuper.com.au](http://www.smartsavesuper.com.au)

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