

Suncorp Employee Superannuation Plan Investment change form



Suncorp Portfolio Services Limited (Trustee)
ABN 61 063 427 958 AFSL 237905 RSE L0002059
USI 98350952022042

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Please use this form to change your existing and/or future investment strategy.

Tips to help you complete this form

- Use blue or black pen and CAPITAL letters
- Use a cross (X) to mark answer boxes
- Select your investment instructions from section 2 and follow instructions within each section to complete

Don't use this form if:

- You're switching (a) part of your balance to or (b) any amount from a Suncorp WealthSmart Term Deposit. Instead, please use the Suncorp Employee Superannuation Plan Term Deposit Investment change form available at suncorp.com.au

Any questions? If you'd like help completing this form, or if you have any questions, just call us on 1800 652 489 between 8am and 6pm (Eastern Standard Time) Monday to Friday.

1. Personal details

Suncorp Employee Superannuation Plan account number

Title

Last name

Given name(s)

Date of birth / /

Daytime phone number Mobile

Email

2. Investment instructions

Please cross (X) only one box below and then complete your investment selection details in section 4.

- Please change my **existing investments** and my **future investment strategy** – complete both columns A and B.
- Please change only my **existing investments** – complete column A only.
- Please change only my **future investment strategy** – complete column B only.

3. Auto-rebalancing

Starting, changing or cancelling auto-rebalancing

You can use this section to start, change or cancel auto-rebalancing. Please refer to the Suncorp Employee Superannuation Plan Product Guide for further information about auto-rebalancing.

- a) Start auto-rebalancing**
Please apply auto re-balancing to my account: Quarterly Half-yearly Yearly
- b) Change auto-rebalancing**
Please change the frequency of my current auto-rebalancing to apply: Quarterly Half-yearly Yearly
- c) Cancel auto-rebalancing** Please cancel my auto-rebalancing

Please note if you continue auto-rebalancing, your current investments excluding Suncorp WealthSmart Term Deposits, will change to be in line with the future investment strategy you nominated at the next rebalancing date. If your future investment strategy is the Suncorp Lifestage Fund, you cannot use the auto-rebalancing facility.

4. Investment selection

You may select a maximum of 20 investment options at any time. Please note, each Suncorp WealthSmart Term Deposit you hold counts as one investment option. Please refer to the investment information in the current Suncorp Employee Superannuation Plan Product Disclosure Statement (PDS) and Product Guide before selecting an investment option. For some investment options, a PDS is issued by the underlying manager, free of charge. You can download copies from our website or ask us for a printed version. Before you make an investment choice you should consider the relevant investment manager's PDS.

If you want your investment selection change to apply to your whole balance, complete PART A. For specific or part investment selection changes, complete PART B on the next page.

PART A	A Change my existing investments	B Change my future investment strategy
Suncorp Lifestage Fund <input type="checkbox"/> I want to invest my future contributions in the Suncorp Lifestage Fund based on my date of birth. or <input type="checkbox"/> I want to invest in the following investments (Please fill in the details below)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
Diversified investment options Secure Suncorp Secure Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
Conservative Suncorp Conservative Portfolio Suncorp Universal Capital Stable Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
Balanced Suncorp Balanced Portfolio Suncorp Universal Balanced Fund.....	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
Growth Suncorp Growth Portfolio..... Suncorp Universal Growth Fund.....	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
High growth Suncorp High Growth Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
Single sector investment options Cash Suncorp Cash Fund Suncorp Guaranteed Cash Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
Australian fixed interest Tyndall Australian Bond Fund..... Vanguard® Australian Fixed Interest Index Fund.....	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
International fixed interest Vanguard® International Fixed Interest Index Fund (Hedged)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
Diversified fixed interest Macquarie Diversified Fixed Interest Fund.....	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
Diversified income Colonial First State Global Credit Income Fund.....	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
Australian property Ironbark RREEF Paladin Property Securities Fund Vanguard® Australian Property Securities Index Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
International property Vanguard® International Property Securities Index Fund (Hedged)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
Australian shares Ausbil Australian Active Equity Fund..... BT Wholesale Imputation Fund Fidelity Australian Equities Fund Ibbotson Australian Shares Active Trust Perennial Growth Shares Wholesale Trust Perpetual Wholesale Industrial Fund..... Suncorp Australian Shares Fund..... Tyndall Australian Share Wholesale Portfolio Vanguard® Australian Shares Index Fund.....	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
Australian shares – specialist Ausbil Australian Emerging Leaders Fund Perpetual Wholesale Geared Australian Fund..... Tyndall Australian Share Income Fund Zurich Investments Equity Income Fund.....	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
International shares Grant Samuel Epoch Global Equity Shareholder Yield (Unhedged) Fund Platinum International Fund Suncorp Global Shares Fund Vanguard® International Shares Index Fund..... Walter Scott Global Equity Fund.....	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %
International shares – specialist BlackRock Global Allocation Fund..... Colonial First State Global Resources Fund Lazard Global Small Cap Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> %

Closed investment options*

Diversified investment options

Secure

Suncorp Traditional Capital Guaranteed Fund.....

□□□□ %

□□□□ %

Conservative

Suncorp Traditional Capital Stable Fund.....

□□□□ %

□□□□ %

Growth

Suncorp Traditional Growth Fund

□□□□ %

□□□□ %

High growth

Suncorp Traditional High Growth Fund.....

□□□□ %

□□□□ %

Single sector investment options

Australian fixed interest

Suncorp Australian Fixed Interest Fund.....

□□□□ %

□□□□ %

Australian property

Suncorp Listed Property Fund

□□□□ %

□□□□ %

International shares

Ibbotson International Shares Active (Unhedged) Trust.....

□□□□ %

□□□□ %

Total

1 0 0 %

1 0 0 %

* Only available to members currently invested in these options.

PART B

Please complete this section if you want to change only part of your existing investments and leave your other investments unchanged. An example is noted in the first row.

Current option

□ Suncorp Balanced Portfolio

□

□

□

□

New option

□ Suncorp Growth Portfolio

□

□

□

□

5. Declaration and signature

- I understand for some investment options, a separate PDS is issued by the underlying investment manager and is available at suncorp.com.au or by contacting you, and I consent to getting these PDSs by downloading them from this website or asking you for a printed version.
- My investment choices have been made after reading the current Suncorp Employee Superannuation Plan PDS and Product Guide, and the underlying investment manager's PDS for each investment option.
- I acknowledge, when I make any investment decisions or transact on my account, I may not have read the most recent investment manager's PDS for each investment option and may not have been notified about material changes or significant events that adversely affect a matter that should be in the PDS for those investment options.
- I consent to getting notification and an explanation of any material change or significant event that adversely affects a matter in the most recent PDS(s) for the underlying financial product(s) for each investment option by downloading the information from suncorp.com.au
- I understand that, if I've started or changed auto-rebalancing, my current investments will be switched in line with my nominated future investment strategy on each rebalancing date.
- I understand that auto-rebalancing will not apply to any money invested in Suncorp WealthSmart Term Deposits or the Suncorp Lifestage Fund.
- I understand that if I've changed my future investment strategy and have auto-rebalancing, my current investments will be switched in line with my changed future investment strategy on each rebalancing date.
- I've read and agree to be bound by the Suncorp privacy policy which is available at suncorp.com.au

Signature

□ X

Date □□/□□/□□□□

Important notes

- The unit prices you'll receive for your request will depend upon the time and day we receive this form. For more information, please refer to the current Suncorp Employee Superannuation Plan Product Guide.
- You can only cancel the instructions in this form if we receive your cancellation request by 12pm on the same day we receive this form.
- We may delay the processing of your request until we receive all funds from an investment manager or if the transaction would adversely affect the interests of other members. Also, where we're directed by a lawful authority to suspend or vary the transaction, we'll comply with that direction.
- We don't charge a transaction fee, although you may incur a buy-sell spread charged by the manager of the investment option.

Please send the completed form and any required attachments to:

Suncorp Employee Superannuation Plan
GPO Box 2585 (IPC: LS004)
Brisbane QLD 4001

Or fax to: 07 3002 3259