

# Suncorp Employee Superannuation Plan

## Additional investment form



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

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**Use this form to make an additional investment to your Suncorp Employee Superannuation Plan account.** If you'd like to invest part or all of your additional investment into Suncorp WealthSmart Term Deposits, please complete the **Suncorp Employee Superannuation Plan Term Deposit Additional investment form** instead.

**Tips to help you complete this form**

- Use blue or black pen and CAPITAL letters
- Use a cross (X) to mark answer boxes
- Read the important information section below
- Complete all of the form and sign and date on the last page

**Any questions?** If you'd like help completing this form, or if you have any questions, just call us on 1800 652 489

**Important Information**

Please refer to the current Suncorp Employee Superannuation Plan Product Disclosure Statement (PDS) and Member Booklet for further information before making an additional investment.

### 1. Personal details

Suncorp Employee Superannuation Plan account number

Title

Last name

Given name(s)

Date of birth   /   /

Daytime phone number           Mobile

Email

### 2. Tax file number (TFN) notification

It's important we have your TFN. While providing your TFN is voluntary, you should know that if you don't provide us your TFN, then:

- we can't accept any non-concessional contributions
- you may pay more tax on concessional contributions than would otherwise be payable and
- it may be difficult to find and consolidate your super in the future.

For more information, please refer to the current Suncorp Employee Superannuation Plan PDS and Member Booklet.

TFN

### 3. Additional contribution

Please indicate the type of contribution you would like to make.

**Additional contribution type**

Personal contribution \$  ,    ,     .

Employer contribution \$  ,    ,     .

Salary sacrifice/  
Additional employer contribution \$  ,    ,     .

Spouse contribution \$  ,    ,     .

**Total contribution** \$  ,    ,     .

### 4. How would you like to invest your additional investment?

- I'd like to invest it in line with my future investment strategy (my usual investment options) that I've previously provided you – Please go to section 7
- or
- I'd like to invest it differently from my future investment strategy – Please go to section 5 to let us know which investment option you'd like to choose then section 6 if you have auto-rebalancing.

## 5. Investment selection (if different from future investment strategy, otherwise go straight to section 7)

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 PDS and Member Booklet 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'd like to invest in one or more Suncorp WealthSmart Term Deposits, please complete the Suncorp Employee Superannuation Plan Term Deposit additional investment form instead.

Diversified investment options	Percentage
<b>Secure</b>	
Suncorp Traditional Capital Guaranteed Fund .....	_ _ _  %
Suncorp Secure Portfolio .....	_ _ _  %
<b>Conservative</b>	
Suncorp Conservative Portfolio .....	_ _ _  %
Suncorp Universal Capital Stable Fund .....	_ _ _  %
<b>Balanced</b>	
Suncorp Balanced Portfolio .....	_ _ _  %
Suncorp Universal Balanced Fund .....	_ _ _  %
<b>Growth</b>	
Suncorp Growth Portfolio .....	_ _ _  %
Suncorp Universal Growth Fund .....	_ _ _  %
<b>High growth</b>	
Suncorp High Growth Portfolio .....	_ _ _  %
<b>Single sector investment options</b>	
<b>Cash</b>	
Suncorp Cash Fund .....	_ _ _  %
Suncorp Guaranteed Cash Fund .....	_ _ _  %
<b>Australian fixed interest</b>	
Tyndall Australian Bond Fund .....	_ _ _  %
Vanguard® Australian Fixed Interest Index Fund .....	_ _ _  %
<b>International fixed interest</b>	
Vanguard® International Fixed Interest Index Fund (Hedged) .....	_ _ _  %
<b>Diversified fixed interest</b>	
Macquarie Diversified Fixed Interest Fund .....	_ _ _  %
<b>Diversified income</b>	
Colonial First State Global Credit Income Fund .....	_ _ _  %
<b>Australian property</b>	
RREEF Paladin Property Securities Fund .....	_ _ _  %
Vanguard® Property Securities Index Fund .....	_ _ _  %
<b>International property</b>	
Vanguard® International Property Securities Index Fund (Hedged) .....	_ _ _  %
<b>Australian shares</b>	
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 .....	_ _ _  %
<b>Australian shares – specialist</b>	
Ausbil Australian Emerging Leaders Fund .....	_ _ _  %
Perpetual Wholesale Geared Australian Fund .....	_ _ _  %
Tyndall Australian Share Income Fund .....	_ _ _  %
Zurich Investments Equity Income Fund .....	_ _ _  %
<b>International shares</b>	
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 .....	_ _ _  %
<b>International shares – specialist</b>	
BlackRock Global Allocation Fund .....	_ _ _  %
Colonial First State Global Resources Fund .....	_ _ _  %
Lazard Global Small Cap Fund .....	_ _ _  %

### Closed investment options\*

#### Diversified investment options

##### 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 ] %

\* Only available to members currently invested in these options.

## 6. Auto-rebalancing

Because you're investing this money into different investment options from your standing arrangements (your future investment strategy) with us, we'd like to check a couple of things.

Does this mean you want to cancel auto-rebalancing on your account? Unless you tell us otherwise, we'll leave auto-rebalancing in place on your account when we process this form.

- I'd like to continue using auto-rebalancing using my existing instructions
- I'd like to continue using auto-rebalancing and change my future investment strategy to the options selected in section 5
- I'd like to cancel auto-rebalancing

If you continue using auto-rebalancing, it'll switch all your current investments (including this additional investment) to your future investment strategy at each rebalancing date, which might not be what you want if you're choosing different options for this investment.

If your auto-rebalancing is cancelled now, you can easily start it again later (and nominate other investment options) by completing an investment change form which is available from our website.

## 7. Declaration and signature

- I understand for some investment options, a separate PDS is issued by the underlying investment manager and is available from your website at [suncorp.com.au](http://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 Member Booklet, 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 have not 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 option
- 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 your website at [suncorp.com.au](http://suncorp.com.au)
- I understand that if I've not indicated otherwise, auto-rebalancing will remain on my account
- I understand that auto-rebalancing will not apply to any money invested in Suncorp WealthSmart Term Deposits.
- I understand that, if I've chosen to continue auto-rebalancing, then my current investments (including this additional investment) will be switched in line with my previously nominated future investment strategy on the first rebalancing date that my future investments have changed to
- I've read and agree to be bound by the Suncorp privacy policy which is available on your website at [suncorp.com.au](http://suncorp.com.au)

Signature

X

Date [ d ] [ d ] / [ m ] [ m ] / [ y ] [ y ] [ y ] [ y ]

#### 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 Member Booklet
- 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

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**