



#### 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 don't complete this form. Please complete the standard Suncorp WealthSmart Additional investment form.
- or
- I'd like to invest some or all of my additional investment in Suncorp WealthSmart Term Deposits – Please go to section 5 to let us know which investment option you'd like to choose.

#### 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. There are restrictions on the minimum (\$1,000) and maximum (70% of your account balance) amount you can invest in Suncorp WealthSmart Term Deposits. More information on term deposit investment restrictions and interest adjustments can be found in the Suncorp WealthSmart Product Update dated 3 December 2012.

For more information on the investment options available within Suncorp WealthSmart, please refer to the current Suncorp WealthSmart 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.

| Investment option   | Amount (please fill in EITHER percentage or dollar only) |                  |
|---|--|------------------|
| <b>Term deposits</b>  |  |                  |
| Suncorp WealthSmart Term Deposit 6 month term                   | □□□ . □□□ %  | \$ _____ . _____ |
| Suncorp WealthSmart Term Deposit 1 year term                    | □□□ . □□□ %  | \$ _____ . _____ |
| Suncorp WealthSmart Term Deposit 3 year term                    | □□□ . □□□ %  | \$ _____ . _____ |
| Suncorp WealthSmart Term Deposit 5 year term                    | □□□ . □□□ %  | \$ _____ . _____ |
| <b>Diversified investment options</b>                           |  |                  |
| <b>Secure</b>   |  |                  |
| 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                                       | □□□□.□□□ % | \$ _____. |
| <b>Closed investment options – diversified*</b>                    |            |           |
| <b>Secure</b>  |            |           |
| Suncorp Traditional Capital Guaranteed Fund                        | □□□□.□□□ % | \$ _____. |
| <b>Conservative</b>  |            |           |
| Suncorp Traditional Capital Stable Fund                            | □□□□.□□□ % | \$ _____. |
| <b>Balanced</b>  |            |           |
| Suncorp Traditional Balanced Fund                                  | □□□□.□□□ % | \$ _____. |
| <b>Growth</b>  |            |           |
| Suncorp Traditional Growth Fund                                    | □□□□.□□□ % | \$ _____. |
| <b>High growth</b>   |            |           |
| Suncorp Traditional High Growth Fund                               | □□□□.□□□ % | \$ _____. |
| <b>Total</b>   | □□□□.□□□ % | \$ _____. |

\* 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 at [suncorp.com.au](http://suncorp.com.au)

Auto-rebalancing will not apply to any money invested in Suncorp WealthSmart Term Deposits.

## 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 WealthSmart PDS and the Suncorp WealthSmart 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 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 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 your website at [suncorp.com.au](http://suncorp.com.au)
- I understand that, auto-rebalancing will not apply to any money invested in Suncorp WealthSmart Term Deposits.
- Before or at the time I provided any personal information, I read and understood the Trustee's privacy statement in the current Suncorp WealthSmart Product Guide, which is also available at [suncorp.com.au/privacy](http://suncorp.com.au/privacy)
- I consent to the Trustee collecting, using and disclosing my personal information including sensitive information, in accordance with the privacy statement.

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 WealthSmart 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.

Please send the completed form and any required attachments to:

**Suncorp WealthSmart®**  
**GPO Box 2585**  
**Brisbane QLD 4001**

**Or fax to: 1300 172 693**