

Suncorp Superannuation

Significant event notice register



Suncorp Portfolio Services Limited (the Trustee) has communicated the below significant events to its members during the last two years.

Date	Products affected	Reason	Summary of the notice
15/09/2016	Suncorp Brighter Super, Suncorp WealthSmart® Suncorp Employee Superannuation Plan, Optimum Super (including Promina Staff Superannuation Plan), Optimum Professional	Investment option change	Effective 15 September 2016, Investors Mutual is changing the name of the Investors Mutual Industrial Share Fund to Investors Mutual All Industrials Share Fund.
20/06/2016	Suncorp WealthSmart, Suncorp Everyday Super, Suncorp Employee Superannuation Plan	Term Deposit closure	Effective 20 June 2016, Term Deposits are closed to new investments. Members who have a term deposit opened before 20 June 2016 will have no change to that term deposit, but will not be able to reinvest in a new term deposit.
08/06/2016	Suncorp WealthSmart, Suncorp Brighter Super, Suncorp Employee Superannuation Plan.	Change of investment mix	Effective 16 May 2016, the Perpetual Wholesale Industrial Share Fund has had a change of investment mix to reflect that it can now invest up to 10% of its assets in international shares.
18/12/2015	Suncorp Everyday Super, Suncorp WealthSmart, Suncorp Employee Superannuation Plan	Disclosure change	Minor changes have been made to the Duty of Disclosure for the affected products.
1/11/2015	Suncorp Everyday Super, Suncorp WealthSmart, Suncorp Employee Superannuation Plan	Investment option change	The Strategic Asset Allocations and Standard Risk Measure for the Suncorp Lifestage Fund have changed.
1/11/2015	Suncorp Everyday Super, Suncorp WealthSmart, Suncorp Employee Superannuation Plan	Investment option change	Changes have been made to the Suncorp Diversified Portfolios. These changes include: name, investment strategy, strategic asset allocations, standard risk measure and investment time horizon.
20/7/2015	Suncorp Employee Superannuation Plan	Investment option change	Ibbotson has terminated the Ibbotson International Shares Active (Unhedged) Trust investment option due to its small size. The replacement investment option is Suncorp Global Shares Fund.
30/6/2015	Suncorp Employee Superannuation Plan	Stronger Super reforms – intra-fund consolidation	Part of the government's Stronger Super reforms, Suncorp Portfolio Services Limited has automatically consolidated members with multiple superannuation accounts into a single account for some employer super plans – a process called intra-fund consolidation.

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1/6/2015	Suncorp WealthSmart, Suncorp Employee Superannuation Plan	Investment option change	The following Suncorp Traditional Diversified Funds have new strategic asset allocations and ranges: Suncorp Traditional Conservative Fund, Suncorp Traditional Balanced Fund, Suncorp Traditional Growth Fund, Suncorp Traditional High Growth Fund.
18/2/2015	Suncorp WealthSmart, Suncorp Employee Superannuation Plan	Investment option change	The Suncorp Universal Capital Stable Fund is now named Suncorp Universal Conservative Fund. The Suncorp Traditional Capital Stable Fund is now named Suncorp Traditional Conservative Fund.
1/1/2015	Suncorp Everyday Super, Suncorp WealthSmart	Investment option change	Suncorp WealthSmart and Everyday Super Term Deposits have a new break notice period.
16/10/2014	Suncorp WealthSmart, Suncorp Employee Superannuation Plan	Investment option change	Suncorp Portfolio Services Limited purchased the remaining units in the Perpetual Wholesale Monthly Income Fund. The replacement investment option is Suncorp Guaranteed Cash Fund.
1/7/2014	Suncorp WealthSmart, Suncorp Everyday Super	Legislative changes	APRA levy passed onto most members. SIS Act definition changes to Terminal Illness, TPD, and Totally Disabled / Total Disability.

Buy/sell spreads for investment options change from time to time. All current buy/sell spreads are disclosed in the monthly performance reports found [here](#).

Important disclosure

Suncorp Portfolio Services Limited (Trustee) (ABN 61 063 427 958, AFSL 237905, RSE Licence No L0002059) and Suncorp Life & Superannuation Limited (SLSL) (ABN 87 073 979 530, AFSL 229880) are related bodies corporate of Suncorp-Metway Limited (Suncorp) (ABN 66 010 831 722). The obligations of the Trustee and SLSL are not guaranteed by any other company within the Suncorp Group.

This summary was issued by the Trustee on 29/07/2016 and updates the following products:

- Suncorp Everyday Super
- Suncorp Employee Superannuation Plan
- Suncorp WealthSmart Personal Super
- Suncorp WealthSmart Business Super