Suncorp WealthSmart® Business
Additional investment form

Suncorp Superannuation

Suncorp Portfolio Services Limited (Trustee)
ABN 61 063 427 958 AFSL 237905 RSE L0002059
USI RSA0003AU

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

Tips to help you complete this form
- Use blue or black pen and BLOCK letters
- Use a cross (✗) 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 13 11 55 and ask for 'Super' between 8am and 6pm (Eastern Standard Time) Monday to Friday.

Important Information
Please refer to the current Suncorp WealthSmart Product Disclosure Statement (PDS) and Product Guide for further information before making an additional investment.

1. Personal details

Suncorp WealthSmart account number

Title

Last name

Given name(s)

Date of birth d d / m m / y y y y

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 WealthSmart Product Guide.

TFN

3. Additional contribution type

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

Personal contribution	$, , . C C
Employer contribution	$, , . C C
Salary sacrifice/ Additional employer contribution	$, , . C C
Spouse contribution	$, , . C C
Total contribution	**$, , . C C**

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 refer to the investment information in the current Suncorp WealthSmart PDS and the 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'd like to invest in one or more Suncorp WealthSmart Term Deposits, please complete the Suncorp WealthSmart Term Deposit Additional investment form instead.

Suncorp Lifestage Fund

☐ I want to invest my future contributions in the Suncorp Lifestage Fund based on my date of birth. 1 0 0 %

or

☐ I want to invest in the following investments (Please fill in the details below)

Diversified investment options	Percentage
Secure	
Suncorp Secure Portfolio	%
Conservative	
Suncorp Conservative Portfolio	%
Suncorp Universal Capital Stable Fund	%
Balanced	
Suncorp Balanced Portfolio	%
Suncorp Universal Balanced Fund	%
Growth	
Suncorp Growth Portfolio	%
Suncorp Universal Growth Fund	%
High growth	
Suncorp High Growth Portfolio	%

Single sector investment options	Percentage
Cash	
Suncorp Cash Fund	%
Suncorp Guaranteed Cash Fund	%
Australian fixed interest	
Nikko AM Australian Bond Fund	%
Vanguard® Australian Fixed Interest Index Fund	%
International fixed interest	
Vanguard® International Fixed Interest Index Fund (Hedged)	%
Diversified fixed interest	
Macquarie Diversified Fixed Interest Fund	%
Diversifed income	
Colonial First State Global Credit Income Fund	%
Australian property	
Ironbark Paladin Property Securities Fund	%
Vanguard® Australian Property Securities Index Fund	%
International property	
Vanguard® International Property Securities Index Fund (Hedged)	%
Australian shares	
Ausbil Australian Active Equity Fund	%
BT Wholesale Imputation Fund	%
Fidelity Australian Equities Fund	%
Hyperion Australian Growth Companies Fund	%
Ibbotson Australian Shares Active Trust	%
Investors Mutual Industrial Share Fund	%
Ironbark Karara Australian Share Fund	%
Nikko AM-Tyndall Australian Share Wholesale Portfolio	%
Perennial Growth Shares Wholesale Trust	%
Perpetual Wholesale Industrial Fund	%
Perpetual Wholesale SHARE-PLUS Long-Short Fund	%
Suncorp Australian Shares Fund	%
Vanguard® Australian Shares Index Fund	%
Australian shares – specialist	
Ausbil Australian Emerging Leaders Fund	%
Nikko AM-Tyndall Australian Share Income Fund	%
Perpetual Wholesale Ethical SRI Fund	%
Perpetual Wholesale Geared Australian Fund	%
Zurich Investments Equity Income Fund	%
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	%
International shares – specialist	
BlackRock Global Allocation Fund	%
Colonial First State Global Resources Fund	%
Lazard Global Infrastructure Securities Fund	%
Lazard Global Small Cap Fund	%

Infrastructure

Closed investment options*

Diversified investment options

Secure	
Suncorp Traditional Capital Guaranteed Fund	%
Conservative	
Suncorp Traditional Capital Stable Fund	%
Balanced	
Suncorp Traditional Balanced Fund	%
Growth	
Suncorp Traditional Growth Fund	%
High growth	
Suncorp Traditional High Growth Fund	%
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, we'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 it you're choosing different options for this investment. If you invest in the Suncorp Lifestage Fund, you cannot use auto-rebalancing.

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 at suncorp.com.au

7. 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 WealthSmart 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 at suncorp.com.au
- I understand that if I've not indicated otherwise above, auto-rebalancing will remain on my account.
- 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 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.
- 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**
- I consent to the Trustee collecting, using and disclosing my personal information including sensitive information, in accordance with the privacy statement.

Signature ✗ 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 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**