

## Investment change form

Issued 29 March 2017

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

### Use this form to change your existing or future investment strategy or both, or to change your pension payment strategy

Please note that instead of completing this form, you can change your investments online once logged into your Brighter Super account at [suncorp.com.au/super](http://suncorp.com.au/super).

#### Tips to help you complete this form

- Use a blue or black pen and write in CAPITAL letters
- Use an 'X' to mark answer boxes
- Complete all relevant sections of the form and sign and date on the last page

#### Have any questions?

If you'd like help completing this form, or if you have any questions, just call us on 13 11 55.

#### Important information

Please refer to the current Suncorp Brighter Super Product Disclosure Statement (PDS) (including any documents incorporated by reference) for further information before making an additional investment.

## Personal Details

Account number*	<input type="text"/>		
Title*	<input type="text"/>		
Last name*	<input type="text"/>		
Given name(s)*	<input type="text"/>		
Date of birth*	<input type="text"/>		
Daytime phone number*	<input type="text"/>	Mobile phone number*	<input type="text"/>
Email address*	<input type="text"/>		

## Investment instructions

Please cross 'X' only one box below and then complete your investment selection details in the 'Investment allocation' section.

- Please change my **existing investments** and my **future investment strategy** (super only) – complete both columns A and B.
- Please change only my **existing investments** – complete column A only.
- Please change only my **future investment strategy** (super only) – complete column B only.
- Please change only my **pension payment strategy** (pension only) – complete column C only.
- Please change my **existing investments** and my **pension payment strategy** – complete both columns A and C.

## Auto-rebalancing

You can use this section to start, change or cancel auto-rebalancing. The auto-rebalancing facility switches your investments quarterly, half-yearly, or annually to bring them in line with your existing strategy. Please refer to the Suncorp Brighter Super 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

\*Mandatory field

# Investment allocation

Please refer to the investment information in the current Suncorp Brighter Super Product Disclosure Statement (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 want your investment selection change to apply to your whole balance, complete PART 1. For specific or part investment selection changes, complete PART 2.

<b>PART 1</b>	<b>A</b> Change my existing investments (super and pension)	<b>B</b> Change my future investment strategy (super only)	<b>C</b> Change my pension payment strategy (pensions only)
<b>Suncorp Lifestage Funds</b>			
Suncorp Lifestage Fund	_ _ _  %	_ _ _  %	_ _ _  %
<b>Conservative</b>			
Morningstar Conservative Fund	_ _ _  %	_ _ _  %	_ _ _  %
Suncorp Universal Conservative Fund	_ _ _  %	_ _ _  %	_ _ _  %
Perpetual Wholesale Conservative Growth Fund	_ _ _  %	_ _ _  %	_ _ _  %
<b>Moderate</b>			
Morningstar Moderate Fund	_ _ _  %	_ _ _  %	_ _ _  %
<b>Balanced</b>			
Morningstar Balanced Fund	_ _ _  %	_ _ _  %	_ _ _  %
Perpetual Wholesale Diversified Growth Fund	_ _ _  %	_ _ _  %	_ _ _  %
Suncorp Universal Balanced Fund	_ _ _  %	_ _ _  %	_ _ _  %
<b>Growth</b>			
BlackRock Wholesale Balanced Fund	_ _ _  %	_ _ _  %	_ _ _  %
Morningstar Growth Fund	_ _ _  %	_ _ _  %	_ _ _  %
Suncorp Traditional Growth Fund	_ _ _  %	_ _ _  %	_ _ _  %
Suncorp Universal Growth Fund	_ _ _  %	_ _ _  %	_ _ _  %
<b>High growth</b>			
Morningstar High Growth Fund	_ _ _  %	_ _ _  %	_ _ _  %
Suncorp Traditional High Growth Fund	_ _ _  %	_ _ _  %	_ _ _  %
<b>Cash</b>			
Suncorp Cash Fund	_ _ _  %	_ _ _  %	_ _ _  %
<b>Australian fixed interest</b>			
Suncorp Australian Fixed Interest Fund	_ _ _  %	_ _ _  %	_ _ _  %
Vanguard Australian Fixed Interest	_ _ _  %	_ _ _  %	_ _ _  %
<b>International fixed interest</b>			
Vanguard International Fixed Interest Index Fund (Hedged)	_ _ _  %	_ _ _  %	_ _ _  %
<b>Diversified fixed interest</b>			
Macquarie Diversified Fixed Interest Fund	_ _ _  %	_ _ _  %	_ _ _  %
<b>Diversified credit</b>			
CFS Wholesale Global Credit Income Fund	_ _ _  %	_ _ _  %	_ _ _  %
<b>Australian listed property</b>			
Ironbark Paladin Property Securities Fund	_ _ _  %	_ _ _  %	_ _ _  %
Suncorp Australian Listed Property Index Fund	_ _ _  %	_ _ _  %	_ _ _  %
<b>International listed property</b>			
Suncorp International Property Securities Index Fund (Hedged)	_ _ _  %	_ _ _  %	_ _ _  %
<b>Global listed property (Australian and international)</b>			
Suncorp Global Property Index Fund	_ _ _  %	_ _ _  %	_ _ _  %
<b>International listed infrastructure</b>			
Lazard Global Infrastructure Fund	_ _ _  %	_ _ _  %	_ _ _  %

**PART 1 continued...**

	<b>A</b> Change my existing investments (super and pension)	<b>B</b> Change my future investment strategy (super only)	<b>C</b> Change my pension payment strategy (pensions only)
<b>Australian shares</b>			
Ausbil Australian Active Equity Fund	_ _ _  %	_ _ _  %	_ _ _  %
BT Wholesale Imputation Fund	_ _ _  %	_ _ _  %	_ _ _  %
Fidelity Australian Equities Fund	_ _ _  %	_ _ _  %	_ _ _  %
Hyperion Australian Growth Companies Fund	_ _ _  %	_ _ _  %	_ _ _  %
Investors Mutual Industrial Share Fund	_ _ _  %	_ _ _  %	_ _ _  %
Ironbark Karara Australian Shares Fund	_ _ _  %	_ _ _  %	_ _ _  %
Perpetual Wholesale Industrial Fund	_ _ _  %	_ _ _  %	_ _ _  %
Perpetual Wholesale SHARE-PLUS Long-Short Fund	_ _ _  %	_ _ _  %	_ _ _  %
Suncorp Australian Shares Index Fund	_ _ _  %	_ _ _  %	_ _ _  %
Suncorp Australian Shares Multi-Manager Fund	_ _ _  %	_ _ _  %	_ _ _  %
Suncorp Australian Shares Value Fund	_ _ _  %	_ _ _  %	_ _ _  %
<b>Australian shares – specialist</b>			
Ausbil Australian Emerging Leaders Fund	_ _ _  %	_ _ _  %	_ _ _  %
Nikko AM Australian Share Income Fund	_ _ _  %	_ _ _  %	_ _ _  %
Perpetual Wholesale Ethical SRI Fund	_ _ _  %	_ _ _  %	_ _ _  %
Perpetual Wholesale Geared Aust Share Fund	_ _ _  %	_ _ _  %	_ _ _  %
Zurich Investments Equity Income Fund	_ _ _  %	_ _ _  %	_ _ _  %
<b>International shares</b>			
Grant Samuel Epoch Global Equity Shareholder Yield (Unhedged)	_ _ _  %	_ _ _  %	_ _ _  %
Platinum International Fund	_ _ _  %	_ _ _  %	_ _ _  %
Suncorp International Shares Index Fund	_ _ _  %	_ _ _  %	_ _ _  %
Suncorp International Shares Multi-Manager Fund	_ _ _  %	_ _ _  %	_ _ _  %
Walter Scott Global Equity Fund	_ _ _  %	_ _ _  %	_ _ _  %
<b>International shares – specialist</b>			
BlackRock Global Allocation Fund	_ _ _  %	_ _ _  %	_ _ _  %
CFS Global Resources Fund	_ _ _  %	_ _ _  %	_ _ _  %
Lazard Global Small Cap Fund	_ _ _  %	_ _ _  %	_ _ _  %
<b>Closed investment options<sup>^</sup></b>			
<b>Secure</b>			
Suncorp Traditional Capital Guaranteed Fund	_ _ _  %	_ _ _  %	_ _ _  %
<b>Conservative</b>			
Suncorp Traditional Conservative Fund	_ _ _  %	_ _ _  %	_ _ _  %
<b>Balanced</b>			
Suncorp Traditional Balanced Fund	_ _ _  %	_ _ _  %	_ _ _  %
<b>Growth</b>			
CFS Wholesale Diversified Shares Fund	_ _ _  %	_ _ _  %	_ _ _  %
<b>Cash</b>			
Suncorp Guaranteed Cash Fund Balanced	_ _ _  %	_ _ _  %	_ _ _  %
<b>Australian listed property</b>			
CFS Wholesale Property Securities Fund	_ _ _  %	_ _ _  %	_ _ _  %
<b>Australian shares</b>			
CFS Wholesale Australian Shares Fund	_ _ _  %	_ _ _  %	_ _ _  %
<b>Total</b>	<b>  1   0   0   %</b>	<b>  1   0   0   %</b>	<b>  1   0   0   %</b>

<sup>^</sup>Only available to members currently invested in these options.

## PART 2

Please complete this section if you want to change only part of your existing investments and leave your other investments unchanged.

### Current option

### New option

	→	
	→	
	→	
	→	
	→	

## Declaration and signature

By signing this form, I confirm:

- I understand for some investment options, a separate PDS is issued by the underlying investment manager and is available 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 Brighter Super 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 your website at [suncorp.com.au](http://suncorp.com.au)
- Before or at the time I provided any personal information, I read and understood the Trustee's privacy statement in the current Suncorp Brighter Super 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

Date   /   /

Full name

### 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 Brighter Super 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.

## Where to send the form

Please send the completed form to:



Suncorp Super  
GPO Box 2585  
Brisbane QLD 4001



[super@suncorp.com.au](mailto:super@suncorp.com.au)