

## Term Deposit investment form

Issued 1 January 2015

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



**If you're changing your entire account balance and want to switch into an Everyday Super Term Deposit please do this online instead of using this form.**

**For everything else, please use this form if you want to switch to or from an Everyday Super Term Deposit.**

### Important!

There are restrictions on the minimum (\$1,000) and maximum (70% of your account balance) amount you can invest in Everyday Super Term Deposits. Also, you must switch out 100% of your investment in an Everyday Super Term Deposit (you can't partially break it).

If you switch out of Everyday Super Term Deposits before they mature you will incur an interest adjustment. If you wish to break your term deposit before the end of your chosen investment term, you must provide us with at least 20 days notice after which the standard term deposit redemption periods will apply.

For more information on the investment options available within Suncorp Everyday Super, including detailed information on investment restrictions and interest adjustments, please refer to the Suncorp Everyday Super Product Disclosure Statement (PDS) and Product Guide.

### 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 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 1800 191 517. We'll be happy to help.

### Important information

Please refer to the current Suncorp Everyday Super Product Disclosure Statement (PDS) (including any documents incorporated by reference) for further information before making a decision.

## Personal details

Suncorp Everyday Super account number

Title

Last name

Given name(s)

Date of birth

Daytime phone number

Alternative phone number

Email address

## Please let us know how you'd like to change your investment

- I'm currently in Everyday Super Term Deposits and I'd like to change (switch) my **entire** account balance to a Suncorp Lifestage Fund.  
**Please tick the box to the left and then complete the 'Declaration and signature'**
- I'm currently in an Everyday Super Term Deposit and I'd like to change (switch) my **entire** account balance to other single sector options.  
**Please complete Table A and then go to 'Declaration and signature'**
- I'm currently in single sector options and would like to change (switch) just **some** of my money **from** or **to** term deposits and other single sector options.  
**Please complete Table B and then go to 'Declaration and signature'**

## Table A. Please switch my entire account balance to single sector investment options

Please complete this section if you have an Everyday Super Term Deposit and want to switch your entire account balance.

Investment option	Please provide the percentage amount you want to switch in (Please use whole numbers and no decimal places.)
Suncorp Australian Shares Fund	_____ %
Suncorp International Shares Fund	_____ %
Suncorp Property Fund	_____ %
Suncorp Australian Fixed Interest Fund	_____ %
Suncorp Cash Fund	_____ %
Everyday Super Term Deposit – 6 month term†	_____ %
Everyday Super Term Deposit – 1 year term†	_____ %
Everyday Super Term Deposit – 3 year term†	_____ %
Everyday Super Term Deposit – 5 year term†	_____ %
<b>Total</b>	_____ 100 %

† Please note your money will be temporarily switched into the Suncorp Cash Fund before being switched into your chosen investment option.

## Table B. Please switch only some of my current single sector investment options

Please complete this section if you're currently in single sector options and would like to change (switch) just **some** of your money from or to term deposits and other single sector options. Please complete **Table B** and then go to 'Declaration and signature'

Please don't use this form if you're not switching from an Everyday Super Term Deposit – Go online instead.

### From

### To

#### Switch from investment option

Please tell us which investment option(s) you want to switch out of

Please provide the dollar amount you want to switch out

Or please provide the percentage amount of the investment you want to switch out

#### Switch to investment option

Please tell us which investment option(s) you want to switch in to

It must be the same method you used on the left (dollar to dollar, or percentage to percentage)

Please provide the dollar amount you want to switch in

Or please provide the percentage amount of the investment you want to switch in

Suncorp Australian Shares Fund	\$ _____	% _____	Suncorp Australian Shares Fund	\$ _____	_____ %
Suncorp International Shares Fund	\$ _____	_____ %	Suncorp International Shares Fund	\$ _____	_____ %
Suncorp Property Fund	\$ _____	_____ %	Suncorp Property Fund	\$ _____	_____ %
Suncorp Australian Fixed Interest Fund	\$ _____	_____ %	Suncorp Australian Fixed Interest Fund	\$ _____	_____ %
Suncorp Cash Fund	\$ _____	_____ %	Suncorp Cash Fund	\$ _____	_____ %
Everyday Super Term Deposit† Please state the term and maturity			Everyday Super Term Deposit Please state the term and maturity		
		100 %	6 months	\$ _____	_____ %
		100 %	1 year	\$ _____	_____ %
		100 %	3 years	\$ _____	_____ %
		100 %	5 years	\$ _____	_____ %
		100 %	<b>Total</b>	\$ _____	<b>100 %</b>
		100 %			
		100 %			
		100 %			
		100 %			
		100 %			
		100 %			
		100 %			
		100 %			
<b>Total</b>	\$ _____	<b>100 %</b>			



In the 'Switch from investment option column', for each term deposit, please nominate the term (either '6 months', '1 year', '3 years' or '5 years') and maturity date in the following example format: '3 years – 15 December 2015'.

Also, you must switch out 100% of your investment in an Everyday Super Term Deposit (you can't partially break it).

Please photocopy this page and attach it to this form if you have more than 15 term deposits.

You must nominate the same method (dollar or percentage) for both sides of the switch. That means if you nominate a dollar amount when switching out, you must nominate a dollar amount when switching in.

Even though you're only switching part of your account balance, if you're doing it using percentages, the 'switch in' total amount on the right must equal 100% of the amount you switched out.

† Please note your money will be temporarily switched into the Suncorp Cash Fund before being switched into your chosen investment option.

## Declaration and signature

By signing this form, I confirm:

- My investment choices have been made after reading the current PDS (including any documents incorporated by reference)
- I acknowledge, when I make any investment decisions or transact on my account, I may have 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 by downloading the information from your website
- Before or at the time I provided any personal information, I read and understood the Trustee's privacy statement in the current Suncorp Everyday 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

**Please note:**

- The unit prices you'll receive for your request will depend upon the time and day we receive this form – see the current Suncorp Everyday Super Product Guide for more information
- 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
- Where we're directed by a lawful authority to suspend or vary the transaction, we'll comply with that direction

## Where to send the form

Please send the completed form to

Suncorp Everyday Super  
GPO Box 2585  
Brisbane QLD 4001