

# Suncorp WealthSmart® Personal Super and Pension Investment change form



Suncorp Portfolio Services Limited (Trustee)  
ABN 61 063 427 958 AFSL 237905 RSE L0002059  
USI RSA0004AU (Personal) RSA0002AU (Pension)

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Please use this form to change your existing or future investment strategy or both, or to change your pension payment strategy.

## Tips to help you complete this form

- Use blue or black pen and BLOCK letters
- Use a cross (X) to mark answer boxes
- Select your investment instructions from section 2 and follow instructions on within each section to complete

## Don't use this form if:

- You're switching (a) part of your balance to or (b) any amount from a Suncorp WealthSmart Term Deposit. Instead, please use the Suncorp WealthSmart Term Deposit Investment change form available at [suncorp.com.au](http://suncorp.com.au)

**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.

## 1. Personal details

|                                    |                      |        |                      |
|------------------------------------|----------------------|--------|----------------------|
| Suncorp WealthSmart 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 | <input type="text"/> |
| Email                              | <input type="text"/> |        |                      |

## 2. Investment instructions

Please cross (X) only one box below and then complete your investment selection details in section 4.

- 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.

## 3. Auto-rebalancing

### Starting, changing or cancelling auto-rebalancing

You can use this section to start, change or cancel auto-rebalancing. Please refer to the Suncorp WealthSmart 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

Please note if you continue auto-rebalancing, your current investments, excluding Suncorp WealthSmart Term deposits, will change to be in line with the future investment strategy (for super) or the **pension payment strategy** (for pension) you nominated at the next rebalancing date.

## 4. Investment allocation

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. Please refer to the investment information in the current Suncorp WealthSmart 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 A. For specific or part investment selection changes, complete PART B on the next page.

| <b>PART A</b>   | <b>A</b><br>Change my existing<br>investments<br>(super and pension) | <b>B</b><br>Change my future<br>investment strategy<br>(super only) | <b>C</b><br>Change my pension<br>payment strategy<br>(pensions only) |
|---|--|---|--|
| <b>Diversified investment options</b>                                   |  |   |  |
| Suncorp Lifestage Fund .....  | _ _ _  %   | _ _ _  %  | _ _ _  %   |
| <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>  |  |   |  |
| Nikko AM 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>  |  |   |  |
| Ironbark Paladin Property Securities Fund.....                          | _ _ _  %   | _ _ _  %  | _ _ _  %   |
| Vanguard® Australian 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 .....                                 | _ _ _  %   | _ _ _  %  | _ _ _  %   |
| 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.....                             | _ _ _  %   | _ _ _  %  | _ _ _  %   |
| <b>Australian shares – specialist</b>                                   |  |   |  |
| 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.....                              | _ _ _  %   | _ _ _  %  | _ _ _  %   |
| <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>Infrastructure</b>   |                    |                    |                    |
| Lazard Global Infrastructure Securities Fund.....                             | [ ][ ][ ] %        | [ ][ ][ ] %        | [ ][ ][ ] %        |
| <b>Closed investment options*</b>   |                    |                    |                    |
| <b>Diversified investment options</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.....                                     | [ ][ ][ ] %        | [ ][ ][ ] %        | [ ][ ][ ] %        |
| * Only available to members currently invested in these options. <b>Total</b> | <b>1   0   0</b> % | <b>1   0   0</b> % | <b>1   0   0</b> % |

## PART B

Please complete this section if you want to change only part of your existing investments and leave your other investments unchanged. An example is noted in the first row.

| Current option             | New option               |
|----------------------------|--------------------------|
| Suncorp Balanced Portfolio | Suncorp Growth Portfolio |
|                            |                          |
|                            |                          |
|                            |                          |
|                            |                          |

## 5. 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](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 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)
- I understand that, if I've started or changed auto-rebalancing, my current investments will be switched in line with my nominated future investment/pension payment strategy on each rebalancing date.
- I understand that auto-rebalancing will not apply to any money invested in Suncorp WealthSmart Term Deposits.
- I understand that if I've changed my future investment/pension payment strategy and have auto-rebalancing, my current investments will be switched in line with my changed future investment/pension payment strategy on each rebalancing date.
- 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

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.
- We don't charge a transaction fee, although you may incur a buy-sell spread charged by the manager of the investment option.

Please send the completed form and any required attachments to: **Suncorp WealthSmart®**  
**GPO Box 2585**  
**Brisbane QLD 4001**

Or fax to: **1300 172 693**