

# Suncorp WealthSmart® Personal Super Additional investment form



Suncorp Portfolio Services Limited (Trustee)  
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USI RSA0004AU

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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 (X) 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	<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. 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 contribution you would like to make.

Personal contribution	\$	<input type="text"/>	,	<input type="text"/>	,	<input type="text"/>	.	<input type="text"/>	<input type="text"/>
Employer contribution	\$	<input type="text"/>	,	<input type="text"/>	,	<input type="text"/>	.	<input type="text"/>	<input type="text"/>
Salary sacrifice/ Additional employer contribution	\$	<input type="text"/>	,	<input type="text"/>	,	<input type="text"/>	.	<input type="text"/>	<input type="text"/>
Spouse contribution	\$	<input type="text"/>	,	<input type="text"/>	,	<input type="text"/>	.	<input type="text"/>	<input type="text"/>
<b>Total contribution</b>	\$	<input type="text"/>	,	<input type="text"/>	,	<input type="text"/>	.	<input type="text"/>	<input type="text"/>

## 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 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.

<b>Diversified investment options</b>	Percentage
Suncorp Lifestage Fund .....	_ _ _  %
<b>Conservative</b>	
Suncorp Conservative Portfolio .....	_ _ _  %
Suncorp Universal Conservative Fund .....	_ _ _  %
<b>Moderate</b>	
Suncorp Moderate Portfolio .....	_ _ _  %
<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 .....	_ _ _  %
Henderson Australian Equity Fund .....	_ _ _  %
Hyperion Australian Growth Companies Fund .....	_ _ _  %
Investors Mutual Industrial Share Fund .....	_ _ _  %
Ironbark Karara Australian Share Fund .....	_ _ _  %
Morningstar Australian Shares Fund .....	_ _ _  %
Nikko AM-Tyndall Australian Share Wholesale Portfolio .....	_ _ _  %
Perpetual Wholesale Industrial Share 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 Share 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 Listed Infrastructure Fund.....	_ _ _  %
<b>Closed investment options*</b>	
<b>Diversified investment options</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>	
Suncorp Traditional Growth Fund .....	_ _ _  %
<b>High growth</b>	
Suncorp Traditional High Growth Fund.....	_ _ _  %
<b>Total</b>	<b>  1   0   0   %</b>

\* 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 if you're choosing different options for this investment.

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](http://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](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 at [suncorp.com.au](http://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.
- 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](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.
- If I am 65 years or older, I confirm that I have been gainfully employed for at least 40 hours within 30 consecutive days during the current financial year.

Signature

Date    /    /

### 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**