

# Suncorp WealthSmart®

## Term Deposit additional investment form



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

Use this form to make an additional investment into a Suncorp WealthSmart Term Deposit. If you don't want these funds to be invested in a Suncorp WealthSmart Term Deposit, please complete the standard Suncorp WealthSmart Additional investment form.

### 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'

### Important Information

There are restrictions on the minimum (\$1,000) and maximum (70% of your account balance) amount you can invest in Suncorp WealthSmart Term Deposits. More information on term deposit investment restrictions and interest adjustments can be found in the Suncorp WealthSmart Product Update issued 3 December 2012. Please refer to the current Suncorp WealthSmart Product Disclosure Statement (PDS) and Product Guide for further information before making an additional investment. 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.

## 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

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

### Additional contribution type

Personal contribution	\$ <input type="text"/>
Employer contribution	\$ <input type="text"/>
Salary sacrifice/ Additional employer contribution	\$ <input type="text"/>
Spouse contribution	\$ <input type="text"/>
<b>Total contribution</b>	\$ <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 don't complete this form. Please complete the standard Suncorp WealthSmart Additional investment form.
- or
- I'd like to invest some or all of my additional investment in Suncorp WealthSmart Term Deposits – Please go to section 5 to let us know which investment option you'd like to choose.

#### 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 note, each Suncorp WealthSmart Term Deposit you hold counts as one investment option. There are restrictions on the minimum (\$1,000) and maximum (70% of your account balance) amount you can invest in Suncorp WealthSmart Term Deposits. More information on term deposit investment restrictions and interest adjustments can be found in the Suncorp WealthSmart Product Update dated 3 December 2012.

For more information on the investment options available within Suncorp WealthSmart, please refer to the current Suncorp WealthSmart Product Disclosure Statement (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.

Investment option	Amount (please fill in EITHER percentage or dollar only)	
<b>Term deposits</b>		
Suncorp WealthSmart Term Deposit 6 month term	□□□□ . □□□ %	\$ _____ . _____
Suncorp WealthSmart Term Deposit 1 year term	□□□□ . □□□ %	\$ _____ . _____
Suncorp WealthSmart Term Deposit 3 year term	□□□□ . □□□ %	\$ _____ . _____
Suncorp WealthSmart Term Deposit 5 year term	□□□□ . □□□ %	\$ _____ . _____
<b>Diversified investment options</b>		
<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® Property Securities Index Fund	□□□□□ . □□□ %	\$ _____ . _____
<b>International property</b>		
Vanguard® International Property Securities Index Fund (Hedged)	□□□□□ . □□□ %	\$ _____ . _____

<b>Australian shares</b>		
Ausbil Australian Active Equity Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
BT Wholesale Imputation Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Fidelity Australian Equities Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Hyperion Australian Growth Companies Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Ibbotson Australian Shares Active Trust	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Investors Mutual Industrial Share Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Ironbark Karara Australian Share Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Nikko AM-Tyndall Australian Share Wholesale Portfolio	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Perennial Growth Shares Wholesale Trust	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Perpetual Wholesale Industrial Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Perpetual Wholesale SHARE-PLUS Long-Short Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Suncorp Australian Shares Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Vanguard® Australian Shares Index Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>Australian shares – specialist</b>		
Ausbil Australian Emerging Leaders Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Nikko AM-Tyndall Australian Share Income Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Perpetual Wholesale Ethical SRI Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Perpetual Wholesale Geared Australian Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Zurich Investments Equity Income Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>International shares</b>		
Grant Samuel Epoch Global Equity Shareholder Yield (Unhedged) Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Platinum International Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Suncorp Global Shares Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Vanguard® International Shares Index Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Walter Scott Global Equity Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>International shares – specialist</b>		
BlackRock Global Allocation Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Colonial First State Global Resources Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Lazard Global Small Cap Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>Infrastructure</b>		
Lazard Global Infrastructure Securities Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>Closed investment options – diversified*</b>		
<b>Secure</b>		
Suncorp Traditional Capital Guaranteed Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>Conservative</b>		
Suncorp Traditional Capital Stable Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>Balanced</b>		
Suncorp Traditional Balanced Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>Growth</b>		
Suncorp Traditional Growth Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>High growth</b>		
Suncorp Traditional High Growth Fund	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>Total</b>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/> %	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

\* 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, it'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 from our website at [suncorp.com.au](http://suncorp.com.au)

Auto-rebalancing will not apply to any money invested in Suncorp WealthSmart Term Deposits.

## 7. Declaration and signature

- I understand for some investment options, a separate PDS is issued by the underlying investment manager and is available from your website 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 the Suncorp WealthSmart 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 have not 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, auto-rebalancing will not apply to any money invested in Suncorp WealthSmart Term Deposits.
- 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

X

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**