

Suncorp WealthSmart®

Term Deposit investment change form



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

Please use this form to change some of your existing investments into or out of Suncorp WealthSmart Term Deposits.

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. Also, you must switch out 100% of your investment in a Suncorp WealthSmart Term Deposit (you can't partially break it). 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.

If you switch out of Suncorp WealthSmart Term Deposits before they mature you will incur an interest adjustment. If switching out of Suncorp WealthSmart Term Deposits your money will be temporarily switched into the Suncorp Cash Fund before being switched into your chosen investment option.

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

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 the sections to complete.
- Complete all relevant sections 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'

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) (you can't have Suncorp WealthSmart Term Deposits as part of your future investment strategy) – complete both columns A and B.
- Please change my **existing investments** and my **pension payment strategy** (you can't have Suncorp WealthSmart Term Deposits as part of your pension payment strategy) – complete both columns A and C.
- Please change only my **existing investments** – complete column A only.

3. Auto-rebalancing

Please note:

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 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 selection

Important information

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 Product Update issued 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.

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.

PART A

	A Change my existing investments (super and pension)	B Change my future investment strategy (super only)	C Change my pension payment strategy (pensions only)
Term deposits			
Please note: Suncorp WealthSmart Term Deposits cannot form part of your future investment strategy or pension payment			
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	_ _ %		
Diversified investment options			
Secure			
Suncorp Secure Portfolio	_ _ _ %	_ _ _ %	_ _ _ %
Conservative			
Suncorp Conservative Portfolio	_ _ _ %	_ _ _ %	_ _ _ %
Suncorp Universal Capital Stable Fund	_ _ _ %	_ _ _ %	_ _ _ %
Balanced			
Suncorp Balanced Portfolio	_ _ _ %	_ _ _ %	_ _ _ %
Suncorp Universal Balanced Fund.....	_ _ _ %	_ _ _ %	_ _ _ %
Growth			
Suncorp Growth Portfolio.....	_ _ _ %	_ _ _ %	_ _ _ %
Suncorp Universal Growth Fund.....	_ _ _ %	_ _ _ %	_ _ _ %
High growth			
Suncorp High Growth Portfolio	_ _ _ %	_ _ _ %	_ _ _ %
Single sector investment options			
Cash			
Suncorp Cash Fund	_ _ _ %	_ _ _ %	_ _ _ %
Suncorp Guaranteed Cash Fund	_ _ _ %	_ _ _ %	_ _ _ %
Australian fixed interest			
Nikko AM Australian Bond Fund	_ _ _ %	_ _ _ %	_ _ _ %
Vanguard® Australian Fixed Interest Index Fund.....	_ _ _ %	_ _ _ %	_ _ _ %
International fixed interest			
Vanguard® International Fixed Interest Index Fund (Hedged)	_ _ _ %	_ _ _ %	_ _ _ %
Diversified fixed interest			
Macquarie Diversified Fixed Interest Fund.....	_ _ _ %	_ _ _ %	_ _ _ %
Diversified income			
Colonial First State Global Credit Income Fund.....	_ _ _ %	_ _ _ %	_ _ _ %
Australian property			
Ironbark Paladin Property Securities Fund.....	_ _ _ %	_ _ _ %	_ _ _ %
Vanguard® Property Securities Index Fund	_ _ _ %	_ _ _ %	_ _ _ %
International property			
Vanguard® International Property Securities Index Fund (Hedged) ...	_ _ _ %	_ _ _ %	_ _ _ %
Australian shares			
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.....	<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"/> %
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"/> %
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"/> %
Australian shares – specialist			
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"/> %
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"/> %
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"/> %
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"/> %
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"/> %
International shares			
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"/> %
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"/> %
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"/> %
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"/> %
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"/> %
International shares – specialist			
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"/> %
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"/> %
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"/> %
Infrastructure			
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"/> %
Closed investment options*			
Diversified investment options			
Secure			
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"/> %
Conservative			
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"/> %
Balanced			
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"/> %
Growth			
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"/> %
High growth			
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"/> %
* Only available to members currently invested in these options. Total	1 0 0 %	1 0 0 %	1 0 0 %

International fixed interest			International fixed interest		
Vanguard® International Fixed Interest Index Fund (Hedged)	\$ _____	□ □ □ □ %	Vanguard® International Fixed Interest Index Fund (Hedged)	\$ _____	□ □ □ □ %
Diversified fixed interest			Diversified fixed interest		
Macquarie Diversified Fixed Interest Fund	\$ _____	□ □ □ □ %	Macquarie Diversified Fixed Interest Fund	\$ _____	□ □ □ □ %
Diversified income			Diversified income		
Colonial First State Global Credit Income Fund	\$ _____	□ □ □ □ %	Colonial First State Global Credit Income Fund	\$ _____	□ □ □ □ %
Australian property			Australian property		
Ironbark Paladin Property Securities Fund	\$ _____	□ □ □ □ %	Ironbark Paladin Property Securities Fund	\$ _____	□ □ □ □ %
Vanguard® Property Securities Index Fund	\$ _____	□ □ □ □ %	Vanguard® Property Securities Index Fund	\$ _____	□ □ □ □ %
International property			International property		
Vanguard® International Property Securities Index Fund (Hedged)	\$ _____	□ □ □ □ %	Vanguard® International Property Securities Index Fund (Hedged)	\$ _____	□ □ □ □ %
Australian shares			Australian shares		
Ausbil Australian Active Equity Fund	\$ _____	□ □ □ □ %	Ausbil Australian Active Equity Fund	\$ _____	□ □ □ □ %
BT Wholesale Imputation Fund	\$ _____	□ □ □ □ %	BT Wholesale Imputation Fund	\$ _____	□ □ □ □ %
Fidelity Australian Equities Fund	\$ _____	□ □ □ □ %	Fidelity Australian Equities Fund	\$ _____	□ □ □ □ %
Hyperion Australian Growth Companies Fund	\$ _____	□ □ □ □ %	Hyperion Australian Growth Companies Fund	\$ _____	□ □ □ □ %
Ibbotson Australian Shares Active Trust	\$ _____	□ □ □ □ %	Ibbotson Australian Shares Active Trust	\$ _____	□ □ □ □ %
Investors Mutual Industrial Share Fund	\$ _____	□ □ □ □ %	Investors Mutual Industrial Share Fund	\$ _____	□ □ □ □ %
Ironbark Karara Australian Share Fund	\$ _____	□ □ □ □ %	Ironbark Karara Australian Share Fund	\$ _____	□ □ □ □ %
Perennial Growth Shares Wholesale Trust	\$ _____	□ □ □ □ %	Perennial Growth Shares Wholesale Trust	\$ _____	□ □ □ □ %
Perpetual Wholesale Industrial Fund	\$ _____	□ □ □ □ %	Perpetual Wholesale Industrial Fund	\$ _____	□ □ □ □ %
Perpetual Wholesale SHARE-PLUS Long-Short Fund	\$ _____	□ □ □ □ %	Perpetual Wholesale SHARE-PLUS Long-Short Fund	\$ _____	□ □ □ □ %
Suncorp Australian Shares Fund	\$ _____	□ □ □ □ %	Suncorp Australian Shares Fund	\$ _____	□ □ □ □ %
Nikko AM-Tyndall Australian Share Wholesale Portfolio	\$ _____	□ □ □ □ %	Nikko AM-Tyndall Australian Share Wholesale Portfolio	\$ _____	□ □ □ □ %
Vanguard® Australian Shares Index Fund	\$ _____	□ □ □ □ %	Vanguard® Australian Shares Index Fund	\$ _____	□ □ □ □ %
Australian shares – specialist			Australian shares – specialist		
Ausbil Australian Emerging Leaders Fund	\$ _____	□ □ □ □ %	Ausbil Australian Emerging Leaders Fund	\$ _____	□ □ □ □ %
Perpetual Wholesale Ethical SRI Fund	\$ _____	□ □ □ □ %	Perpetual Wholesale Ethical SRI Fund	\$ _____	□ □ □ □ %
Perpetual Wholesale Geared Australian Fund	\$ _____	□ □ □ □ %	Perpetual Wholesale Geared Australian Fund	\$ _____	□ □ □ □ %
Nikko AM-Tyndall Australian Share Income Fund	\$ _____	□ □ □ □ %	Nikko AM-Tyndall Australian Share Income Fund	\$ _____	□ □ □ □ %
Zurich Investments Equity Income Fund	\$ _____	□ □ □ □ %	Zurich Investments Equity Income Fund	\$ _____	□ □ □ □ %

International shares			International shares		
Grant Samuel Epoch Global Equity Shareholder Yield (Unhedged) Fund	\$ _____	□ □ □ □ %	Grant Samuel Epoch Global Equity Shareholder Yield (Unhedged) Fund	\$ _____	□ □ □ □ %
Platinum International Fund	\$ _____	□ □ □ □ %	Platinum International Fund	\$ _____	□ □ □ □ %
Suncorp Global Shares Fund	\$ _____	□ □ □ □ %	Suncorp Global Shares Fund	\$ _____	□ □ □ □ %
Vanguard® International Shares Index Fund	\$ _____	□ □ □ □ %	Vanguard® International Shares Index Fund	\$ _____	□ □ □ □ %
Walter Scott Global Equity Fund	\$ _____	□ □ □ □ %	Walter Scott Global Equity Fund	\$ _____	□ □ □ □ %
International shares – specialist			International shares – specialist		
BlackRock Global Allocation Fund	\$ _____	□ □ □ □ %	BlackRock Global Allocation Fund	\$ _____	□ □ □ □ %
Colonial First State Global Resources Fund	\$ _____	□ □ □ □ %	Colonial First State Global Resources Fund	\$ _____	□ □ □ □ %
Lazard Global Small Cap Fund	\$ _____	□ □ □ □ %	Lazard Global Small Cap Fund	\$ _____	□ □ □ □ %
Infrastructure			Infrastructure		
Lazard Global Infrastructure Securities Fund	\$ _____	□ □ □ □ %	Lazard Global Infrastructure Securities Fund	\$ _____	□ □ □ □ %
Closed investment options* Diversified investment options			Closed investment options* Diversified investment options		
Secure			Secure		
Suncorp Traditional Capital Guaranteed Fund	\$ _____	□ □ □ □ %	Suncorp Traditional Capital Guaranteed Fund	\$ _____	□ □ □ □ %
Conservative			Conservative		
Suncorp Traditional Capital Stable Fund	\$ _____	□ □ □ □ %	Suncorp Traditional Capital Stable Fund	\$ _____	□ □ □ □ %
Balanced			Balanced		
Suncorp Traditional Balanced Fund	\$ _____	□ □ □ □ %	Suncorp Traditional Balanced Fund	\$ _____	□ □ □ □ %
Growth			Growth		
Suncorp Traditional Growth Fund	\$ _____	□ □ □ □ %	Suncorp Traditional Growth Fund	\$ _____	□ □ □ □ %
High growth			High growth		
Suncorp Traditional High Growth Fund	\$ _____	□ □ □ □ %	Suncorp Traditional High Growth Fund	\$ _____	□ □ □ □ %

† You must switch out 100% of your investment in a Suncorp WealthSmart Term Deposit (you can't partially break it). Please photocopy this page and attach it to this form if you have more than 8 term deposits. Please note your monies will be switched into the Suncorp Cash Fund prior to being switched into your chosen investment option(s).

5. Declaration and signature

- I understand that if I'm invested in a Suncorp WealthSmart Term Deposit and terminate it before it matures, an interest adjustment will apply.
- 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 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
- 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
- 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.
- 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**