

# Suncorp Brighter Super® and Suncorp Employee Superannuation Plan Investment Change Form

**Use this form to change your existing or future investment strategy or both, or to change your pension payment strategy.**

Please note that instead of completing this form, you can change your investments online once logged into your account at [suncorp.com.au/super](http://suncorp.com.au/super).

## 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 relevant 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 between 8am and 6pm (Eastern Standard Time) Monday to Friday.

Suncorp Brighter Super 13 11 55

Suncorp Employee Superannuation Plan 1800 652 489

## Important information

Please refer to the current Suncorp Brighter Super or Suncorp Employee Superannuation Plan Product Disclosure Statement (PDS) (including any documents incorporated by reference) for further information before changing your investments.

## Personal Details

Account number	<input type="text"/>		
Title	<input type="text"/>	<input type="text"/>	
Given name	<input type="text"/>		
Surname	<input type="text"/>		
Date of birth	<input type="text" value="DD / MM / YYYY"/>	<input type="text"/>	
Daytime phone	<input type="text"/>	Mobile phone	<input type="text"/>
Email address	<input type="text"/>		

## Investment Instructions

Please cross 'x' only one box below and then complete your investment selection details in the 'Investment allocation' section.

- 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.

## Auto-Rebalancing

You can use this section to start, change or cancel auto-rebalancing. The auto-rebalancing facility switches your investments quarterly, half-yearly, or annually to bring them in line with your existing strategy, as provided by you in column A in the following table. Please note, if you make an investment choice that differs to your auto-rebalancing strategy this function will automatically stop until your investment choices and auto-rebalancing strategy align again. Refer to the Suncorp Brighter Super or Suncorp Employee Superannuation Plan 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

## Investment Allocation

Please refer to the investment information in the current Suncorp Brighter Super or Suncorp Employee Superannuation Plan 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 1.

For specific or part investment selection changes, complete PART 2.

<b>PART 1</b>	<b>A</b> Change My Existing Investments (also used for auto-rebalancing) <b>(Super and Pension)</b>	<b>B</b> Change My Future Investment Strategy <b>(Super Only)</b>	<b>C</b> Change My Pension Payment Strategy <b>(Pensions Only)</b>
<b>Suncorp Lifestage Funds</b>			
Suncorp Lifestage Fund (Life)	%	%	%
<b>Conservative</b>			
Morningstar Conservative Fund (Mor Con)	%	%	%
Suncorp Multi-Manager Conservative Fund (Sun MM Con)	%	%	%
Suncorp Universal Conservative Fund (Sun Uni Con)	%	%	%
Perpetual Wholesale Conservative Growth Fund (Perp ConGth)	%	%	%
<b>Moderate</b>			
Morningstar Moderate Fund (Mor Mod)	%	%	%
<b>Balanced</b>			
Morningstar Balanced Fund (Mor Bal)	%	%	%
Suncorp Multi-Manager Balanced Fund (Sun MM Bal)	%	%	%
Suncorp Universal Balanced Fund (Sun Uni Bal)	%	%	%
<b>Growth</b>			
BlackRock Tactical Growth Fund (BlackR TGth)	%	%	%
Morningstar Growth Fund (Mor Growth)	%	%	%
Suncorp Multi-Manager Growth Fund (Sun MM Gth)	%	%	%
Suncorp Universal Growth Fund (Sun Uni Gth)	%	%	%
<b>High Growth</b>			
Morningstar High Growth Fund (Mor Growth)	%	%	%
Suncorp Multi-Manager High Growth Fund (Sun MM Hig)	%	%	%
<b>Cash</b>			
Suncorp Cash Fund (Sun Cash)	%	%	%
<b>Australian Fixed Interest</b>			
Suncorp Australian Fixed Interest Fund (Sun Aus FI)	%	%	%
Vanguard Australian Fixed Interest Index Fund (Van Aus FI)	%	%	%
<b>International Fixed Interest</b>			
Suncorp Global Fixed Interest Fund (Sun GFI)	%	%	%
Vanguard International Fixed Interest Index Fund (Hedged) (Van Int FIH)	%	%	%
<b>Diversified Fixed Interest</b>			
Macquarie Dynamic Bond Fund (Maq DynBond)	%	%	%
<b>Diversified Credit</b>			
CFS Wholesale Global Credit Income Fund (CFS GI Cred)	%	%	%
<b>Australian Listed Property</b>			
Ironbark Paladin Property Securities Fund (Iro Pal Pro)	%	%	%
Suncorp Australian Listed Property Index Fund (Sun Aus LP)	%	%	%
<b>International Listed Property</b>			
Suncorp International Property Securities Index Fund (Hedged) (Sun Int Pro)	%	%	%
<b>Global Listed Property (Australian and International)</b>			
Suncorp Global Property Index Fund (Sun GL Prop)	%	%	%
<b>Global Infrastructure</b>			
Lazard Global Infrastructure Securities Fund (Laz Glo Inf)	%	%	%

<b>PART 1 Continued...</b>	<b>A</b> Change My Existing Investments (also used for auto-rebalancing) <b>(Super and Pension)</b>	<b>B</b> Change My Future Investment Strategy <b>(Super Only)</b>	<b>C</b> Change My Pension Payment Strategy <b>(Pensions Only)</b>
<b>Australian Shares</b>			
Ausbil Australian Active Equity Fund (Ausb Aus Eq)	%	%	%
Fidelity Australian Equities Fund (Fid Aus Eq)	%	%	%
Hyperion Australian Growth Companies Fund (Hyp Aus Gth)	%	%	%
Investors Mutual All Industrials Share Fund (IML Indus)	%	%	%
Ironbark Karara Australian Shares Fund (Iro Kar Aus)	%	%	%
Pendal Imputation Fund (Pendal Imp)	%	%	%
Perpetual Wholesale Industrial Fund (Perp Indus)	%	%	%
Perpetual Wholesale SHARE-PLUS Long-Short Fund (Perp SP LS)	%	%	%
Suncorp Australian Shares Index Fund (Sun Aus Ind)	%	%	%
Suncorp Australian Shares Multi-Manager Fund (Sun Aus MM)	%	%	%
Suncorp Australian Shares Value Fund (Sun Aus Val)	%	%	%
<b>Australian shares - Specialist</b>			
Ausbil Australian Emerging Leaders Fund (Ausb Aus EL)	%	%	%
Nikko AM Australian Share Income Fund (NAM Aus Inc)	%	%	%
Perpetual Wholesale Ethical SRI Fund (Perp Eth SRI)	%	%	%
Perpetual Wholesale Geared Aust Share Fund (Perp Geared)	%	%	%
<b>International Shares</b>			
Platinum International Fund (Pla Int)	%	%	%
Suncorp International Shares Fund (Sun Int)	%	%	%
Suncorp International Shares Multi-Manager Fund (Sun Int MM)	%	%	%
Walter Scott Global Equity Fund (WaS Glo Eq)	%	%	%
<b>International Shares - Specialist</b>			
Lazard Global Small Cap Fund (Laz Glo SMC)	%	%	%
<b>CLOSED INVESTMENT OPTIONS<sup>^</sup></b>			
	<b>A</b> Change My Existing Investments <b>(Super and Pension)</b> (also used for auto-rebalancing)	<b>B</b> Change My Future Investment Strategy <b>(Super Only)</b>	<b>C</b> Change My Pension Payment Strategy <b>(Pensions Only)</b>
<b>Secure</b>			
Asteron Traditional Capital Guaranteed Fund (Ast Tra CG)	%	%	%
<b>Growth</b>			
CFS Wholesale Diversified Shares Fund (CFS WS Div)	%	%	%
Perpetual Wholesale Diversified Growth Fund (Perp DivGth)	%	%	%
<b>Cash</b>			
Asteron Guaranteed Cash Fund (Ast Gua Csh)	%	%	%
<b>Australian Listed Property</b>			
CFS Wholesale Property Securities Fund (CFS WS Prop)	%	%	%
<b>Australian Shares</b>			
CFS Wholesale Australian Shares Fund (CFS WS AEQ)	%	%	%
<b>Multi-Sector Specialist</b>			
BlackRock Global Allocation Fund (BlackR GloA)	%	%	%
<b>TOTAL</b>	<b>100 %</b>	<b>100 %</b>	<b>100 %</b>

<sup>^</sup>The investment options are only available to members that are invested in them before their closure date (and currently remain so) and wish to invest additional funds into these investment options.

**PART 2**

Please complete this section if you want to change only part of your existing investments and leave your other investments unchanged.

Current Option	New Option

**Declaration and Signature**

By signing this form, I confirm:

- 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 Brighter Super or Suncorp Employee Superannuation Plan 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)
- Before or at the time I provided any personal information, I read and understood the Trustee’s privacy statement in the current Suncorp Brighter Super or Suncorp Employee Superannuation Plan 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

**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 Brighter Super or Suncorp Employee Superannuation Plan 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 to:**

**Email:** [super@suncorp.com.au](mailto:super@suncorp.com.au)  
**Mail:** GPO Box 2585, Brisbane QLD 4001