



# Switching managed investment options

You can use this form to change managed investment options for your current account balance and/or future cashflow and opt in to automatic rebalancing. Do not use this form for direct investment option (DIO) purposes. The main features of smartMonday DIRECT including investment options are set out in the [smartMonday DIRECT Product Disclosure Statement](#).

## Your details

If you have any questions, please call us on **1300 880 588** or email [enquiries@smartMonday.com.au](mailto:enquiries@smartMonday.com.au)

For more information go to our website [smartMonday.com.au](http://smartMonday.com.au)

Member number (if known)

Title

Given names

Surname

Date of birth

Sex (M or F)

Telephone

Mobile

Email

Postal address

Suburb

State

Postcode

**Send your completed form to: smartMonday, Reply Paid 1949, Wollongong DC, NSW 2500 (no stamp required).**

smartMonday is the business name of the Aon Master Trust ABN 68 964 712 340 (the Fund) which has been registered by Aon Hewitt Limited ABN 48 002 288 646 AFSL 236667 as sponsor of the Fund. The trustee of the Fund is Equity Trustees Superannuation Limited ABN 50 055 641 757 AFSL 229757 RSE Licence L0001458. smartMonday PRIME, smartMonday DIRECT and smartMonday PENSION products are part of the Fund.

## Completing this form

Complete the appropriate columns on page 3 of this form to change the managed investment options for your current account balance and/or future cashflow. We will send you written confirmation once your investment switch has been processed. Switches into or out of DIO must be made online (see the [DIO guide](#)).

You also have access to an automatic rebalancing facility that will help you maintain your intended managed options asset allocation without having to constantly rebalance your portfolio. This facility is optional and you need to actively 'opt in'. Once you have opted in, your portfolio of managed investment options will be rebalanced quarterly to mirror your selected investment strategy. We will send you written confirmation once automatic rebalancing is in place on your account.

We will also confirm each automatic rebalance and your new portfolio values.

Your investment decisions are important and may significantly affect the amount of benefit you receive. Please read the *Important information* below.

## Important information

### Automatic rebalancing

- Automatic rebalancing is not available if you select different strategies for your current account balance and future cashflow.
- Automatic rebalancing is not available where the Aon MySuper investment option is included in the portfolio.
- Automatic rebalancing will apply only in quarters where the actual allocation in one or more managed investment options is at least 5 percentage points higher or lower than your intended allocation.
- Subject to the above point, automatic rebalancing will happen on the following dates:
  - 📅 10 December
  - 📅 10 March
  - 📅 10 June
  - 📅 10 September.
- If you wish to opt in to automatic rebalancing please tick the opt in box below. Your automatic rebalancing will then be based on the allocation chosen on this form.
- If you change your portfolio options or asset allocation, this will cancel the automatic rebalancing facility and you will need to apply for its reinstatement. Please tick the opt in box below for automatic rebalancing to be reinstated. Your automatic rebalancing will then be based on the allocation chosen on this form.

Yes, I wish to opt in to automatic rebalancing.

To ensure your opt in request is processed in time for the next available automatic rebalancing date, we must receive it at least 10 working days before that date.

### Current account balance

- The options you choose must add up to 100%.
- You cannot allocate less than 5% to a chosen option.
- The proportion of your chosen investment allocations may change over time based on unit price fluctuations. Unless you opt in (see above), automatic rebalancing will not apply.

### Future cashflows including rollovers

- The options you choose must add up to 100%.
- You cannot allocate less than 5% to a chosen option.



### Your investment switch

Pre-mixed	Current account balance	Future cashflow	Sector (continued)	Current account balance	Future cashflow
Aon MySuper*	%	%	International Shares – Index	%	%
High Growth – Index	%	%	International Shares – Index (\$A hedged)	%	%
High Growth – Active	%	%	International Shares – Diversified	%	%
Growth – Index	%	%	International Shares – Core	%	%
Growth – Active	%	%	International Shares – Core (\$A hedged)	%	%
Balanced Growth – Index	%	%	International Shares – Emerging Markets	%	%
Balanced Growth – Active	%	%	Property – Australian Index	%	%
Moderate – Index	%	%	Property – Diversified	%	%
Moderate – Active	%	%	Property – Global Listed (\$A hedged)	%	%
Defensive – Index	%	%	Alternative – Diversified	%	%
Defensive – Active	%	%	Fixed Interest – Australian Index	%	%
<b>Sector</b>			Fixed Interest – International Index (\$A hedged)	%	%
Australian Shares – Index	%	%	Fixed Interest – Diversified	%	%
Australian Shares – Diversified	%	%	Fixed Interest – Australian	%	%
Australian Shares – Core	%	%	Fixed Interest – International	%	%
Australian Shares – Socially Responsible	%	%	Cash	%	%
Australian Shares – Opportunities	%	%	<b>Total</b>	<b>100%</b>	<b>100%</b>

\* Aon MySuper is available only to members who transferred from smartMonday PRIME to smartMonday DIRECT on leaving their employer.



## Privacy

Aon and the trustee are committed to protecting your personal information in accordance with the Australian Privacy Principles under the Privacy Act 1988 (Cth). We collect, use and disclose personal information to offer, promote, provide, manage and administer the many financial services and products we and our group of companies are involved in as set out in the [Aon Privacy Policy](#) and the [ETSL Privacy Policy](#). In order to do this, we may also share your information with other persons or entities who assist us in providing or promoting our services as set out in these Policies.

## Your declaration and authorisation

I declare that:

- > as a member of smartMonday DIRECT I will be bound by the trust deed and rules governing the Fund
- > I received a copy of the Product Disclosure Statement (PDS) when I joined smartMonday DIRECT and I acknowledge that some terms and conditions (as set out in that PDS) may have changed over time
- > I have read the current PDS which is designed to help me understand the product and to enable me to make an investment choice that is suitable for me
- > I have read the [Aon Privacy Policy](#) and the [ETSL Privacy Policy](#), and consent to my personal (including sensitive) information being handled in accordance with these policies.

Signature

Date