



# Switching investment options

Members can use this form to change their investment options for their current account balance. The main features of smartMonday PENSION including investment options are set out in the smartMonday PENSION Product Disclosure Statement.

## Section 1: Your details

If you have any questions, please call us on **1300 112 403** or email **support@smartMonday.com.au**

For more information go to our website **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



## Section 2: Your investment switch

Complete the appropriate columns to change the investment options for your current account balance. Your decision is important and it may significantly affect the amount of benefit you receive. Please read the Important information below.

### Important information

#### Current account balance

- The options you choose must total 100% of your current account balance.
- You cannot allocate less than 5% of your current account balance to a chosen option.
- Account balances are not automatically rebalanced. The proportion of your chosen investment allocations may change over time based on unit price fluctuations.

Pre-mixed	Current account Balance	Sector	Current account Balance
High Growth – Index	%	Australian Shares – Index	%
High Growth – Active	%	Australian Shares – Diversified	%
Growth – Index	%	Australian Shares – Core	%
Growth – Active	%	International Shares – Index	%
Balanced Growth – Index	%	International Shares – Index (\$A hedged)	%
Balanced Growth – Active	%	International Shares – Diversified	%
Moderate – Index	%	International Shares – Core	%
Moderate – Active	%	International Shares – Core (\$A hedged)	%
Defensive – Index	%	Property – Australian Index	%
Defensive – Active	%	Property – Diversified	%
	%	Fixed Interest – Australian Index	%
	%	Fixed Interest – International Index (\$A hedged)	%
	%	Fixed Interest – Diversified	%
	%	Fixed Interest – Australian	%
	%	Fixed Interest – International	%
	%	Cash	%
		<b>Total</b>	<b>100%</b>

**NOTE:** If you would like to change the investment options from which your pension payments will be paid, login to your smartMonday PENSION, select the 'Super' icon in the left hand menu and select Pension - Payment Allocation. Alternatively you can use the 'Change member details and options form.

### Section 3: 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.

### Section 4: Your declaration and authorisation

I declare that:

- as a member of smartMonday PENSION I will be bound by the trust deed and the rules governing the Fund
- I received a copy of the Product Disclosure Statement (PDS) when I joined smartMonday PENSION. 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