



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. The main features of smartMonday including investment options are set out in the relevant smartMonday Product Disclosure Statement.

Your details

If you have any questions, please contact us using the details provided on your personalised member homepage.

Member number *(if known)*

Title

Given names

Surname

Date of birth

Sex (M or F)

Telephone

Mobile

Email

Postal address

Suburb

State

Postcode

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.

smartMonday DIRECT members 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 - Available to smartMonday DIRECT members only

- 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*	<input type="text"/> %	<input type="text"/> %	International Shares – Index	<input type="text"/> %	<input type="text"/> %
High Growth – Index	<input type="text"/> %	<input type="text"/> %	International Shares – Index (\$A hedged)	<input type="text"/> %	<input type="text"/> %
High Growth – Active	<input type="text"/> %	<input type="text"/> %	International Shares – Diversified	<input type="text"/> %	<input type="text"/> %
Growth – Index	<input type="text"/> %	<input type="text"/> %	International Shares – Core	<input type="text"/> %	<input type="text"/> %
Growth – Active	<input type="text"/> %	<input type="text"/> %	International Shares – Core (\$A hedged)	<input type="text"/> %	<input type="text"/> %
Balanced Growth – Index	<input type="text"/> %	<input type="text"/> %	International Shares – Emerging Markets	<input type="text"/> %	<input type="text"/> %
Balanced Growth – Active	<input type="text"/> %	<input type="text"/> %	Property – Australian Index	<input type="text"/> %	<input type="text"/> %
Moderate – Index	<input type="text"/> %	<input type="text"/> %	Property – Diversified	<input type="text"/> %	<input type="text"/> %
Moderate – Active	<input type="text"/> %	<input type="text"/> %	Property – Global Listed (\$A hedged)	<input type="text"/> %	<input type="text"/> %
Defensive – Index	<input type="text"/> %	<input type="text"/> %	Alternative – Diversified	<input type="text"/> %	<input type="text"/> %
Defensive – Active	<input type="text"/> %	<input type="text"/> %	Fixed Interest – Australian Index	<input type="text"/> %	<input type="text"/> %
Sector			Fixed Interest – International Index (\$A hedged)	<input type="text"/> %	<input type="text"/> %
Australian Shares – Index	<input type="text"/> %	<input type="text"/> %	Fixed Interest – Diversified	<input type="text"/> %	<input type="text"/> %
Australian Shares – Diversified	<input type="text"/> %	<input type="text"/> %	Fixed Interest – Australian	<input type="text"/> %	<input type="text"/> %
Australian Shares – Core	<input type="text"/> %	<input type="text"/> %	Fixed Interest – International	<input type="text"/> %	<input type="text"/> %
Australian Shares – Opportunities	<input type="text"/> %	<input type="text"/> %	Cash	<input type="text"/> %	<input type="text"/> %
			Total	100%	100%

* Aon MySuper is available only to:

- smartMonday PRIME members, and
- 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 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 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