

Switching investment options

You can use this form to change investment options. Making changes to your investment strategy is an important decision. Before making any changes, you should read the relevant smartMonday Product Disclosure Statement *Investment guide*. If you require advice about your investments, contact a smartCoach on **1300 262 241** or see your personal financial adviser.

Your details

Member number (if known)

Given names

Surname

Phone (mobile)

Email

Postal address

Suburb

State

Postcode

Completing this form

If you have any questions, please contact us. Email or post your completed form to the contact details relevant to your product type, available on your online personalised member homepage.

To perform a switch of your current account balance and/or change how you would like your future contributions to be invested, complete the *Your investment switch* section on the next page, then complete the *Your declaration* section on the last page.

If you're a smartMonday DIRECT member and wish to opt-in to the *Automatic Rebalancing* facility, read the important information and tick the box on the next page.

Your investment switch

- > The investment options you choose must add up to 100% (min. 5% in any option).
- > Investment switches submitted on a valid form will usually take **3 to 5 business days** to be completed and displayed in your account.
- > smartMonday may, from time to time, suspend switching capabilities and unit pricing of investment options. We will endeavour to notify members of significant interruptions via [smartMonday.com.au](https://smartmonday.com.au).
- > For PENSION members:
 - only complete the 'Current account balance' column'
 - to change the investment options from which your regular pension income payments are paid, you can do this online via the member portal, or by completing a *Change member details and options* form at smartmonday.com.au.

Your investment switch (continued)

Automatic rebalancing (DIRECT members only)

This facility is not available if:

- > you nominate different strategies for your current account balance and future contributions,
- > or if you hold the smartMonday Lifecycle (MySuper) investment option in your portfolio.

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 investment allocations you choose on this form. If you subsequently change your investment options or asset allocation, this will cancel the automatic rebalancing facility. To reinstate the facility, tick the opt-in box. Your automatic rebalancing will then be based on the investment allocations you choose on this form.

For more information about automatic rebalancing, see the smartMonday DIRECT PDS [Your investment options](#).

Yes, I am a smartMonday DIRECT member and wish to opt-in to the automatic rebalancing.

| Pre-mixed | Current account balance | Future cashflow | Sector | Current account balance | Future cashflow |
|-----------------------------------|-------------------------|-----------------|--------------------------------------|-------------------------|-----------------|
| smartMonday Lifecycle (MySuper)*^ | % | % | Australian Shares – Index | % | % |
| High Growth – Index | % | % | Australian Shares – Diversified | % | % |
| High Growth – Active | % | % | Australian Shares – Core^ | % | % |
| Growth – Index | % | % | International Shares – Index | % | % |
| Growth – Active | % | % | International Shares – Diversified | % | % |
| Balanced Growth – Index | % | % | Property – Index^ | % | % |
| Balanced Growth – Active | % | % | Property – Diversified | % | % |
| Moderate – Index | % | % | Fixed Interest – Diversified – Index | % | % |
| Moderate – Active | % | % | Fixed Interest – Diversified | % | % |
| Defensive – Index | % | % | Cash | % | % |
| Defensive – Active | % | % | Total | 100% | 100% |

* smartMonday Lifecycle is available only to:

- smartMonday PRIME members, and
- members who transferred from smartMonday PRIME to smartMonday DIRECT on leaving their employer.

^ These investment options are not available in smartMonday PENSION.



Privacy

The fund is subject to the trustee's privacy statement, which is available at eqt.com.au/global/privacystatement

Your declaration

I declare that:

- > I am the person named on this form, or have the power of attorney to act on the member's behalf.
- > The information I have provided on this form is true and correct.
- > I understand investment switches submitted on a valid form will usually take **3 to 5 business days** to be completed and displayed in my account.
- > I understand that smartMonday may, from time to time, suspend switching capabilities and unit pricing of investment options.
- > I have read the current smartMonday PDS relevant to the product I hold, which is designed to help me understand the product and to enable me to make an informed investment choice that is suitable for me.

Signature

Date