

Pension Investment switch application



*Please use **BLOCK** letters and black ink when completing this form.
This notification will be invalid if the Declaration is not signed and dated.*

To make your investment choice, complete this form and return it to SMARTpension.

- Use this form to either establish or change the investment mix for your SMARTpension Account Balance.
- Up to six free switches can be made in a financial year. Any subsequent switches incur a \$30 fee which is deducted from your SMARTpension account.
- Consider your options carefully and seek financial advice from a licensed financial planner if you are unsure which options to choose.
- Your investment mix will be updated within 3 business days from when we receive your form (following declaration of that week's unit prices).
- We'll confirm any change to your investment selection in writing.
- If you have any questions, please contact the SMARTpension hotline on 1300 366 508

Membership details

Mr/Mrs/Ms/Miss/Dr/Rev	Surname	
Given Names		
Date of Birth	SMARTpension Number	
D D M M Y Y Y Y		
Postal address		
Suburb/Town	State	Postcode

Investment choice options

You can choose one, or a combination of two or more of the investment options listed on the following page.

Pension payment method

TICK ONE BOX ONLY

- Matching Payment Option** – Deduct pension payments from each investment option in proportion to the value of your investment option at the time.
- Nominated Payment Option** – Deduct pension payments from nominated investment options in the proportions you request. Please complete the 'Pension payment instruction' column overleaf.

TRUSTEE: PROFESSIONAL ASSOCIATIONS SUPERANNUATION LTD (PASL) ABN: 14 056 917 303 RSE: L0000352 AFSL: 222590

Investment option selection

Investment options	Investment Allocation	Pension Payment Allocation
Aggressive	%	%
Growth	%	%
Moderate	%	%
Stable	%	%
Australian Shares	%	%
Overseas Shares	%	%
Property	%	%
Bonds	%	%
Cash	%	%
Total	100%	100%

Privacy

The information requested on this form is required in order to administer your membership. It may also be provided to specific organisations to provide services to you on our behalf. Your personal information will not be used or disclosed for any other purpose without your consent. If you do not provide the information requested, SMARTpension may not be able to administer your account. You may have access to the information SMARTpension holds about you. If you would like a copy of our Privacy Statement, please visit our website or call 1300 366 508.

Declaration

I understand the investment options available in SMARTpension and request my SMARTpension account balance be invested as shown in this application.

I understand and acknowledge that my direction relates to an investment option or options formulated by the Trustee and not to the underlying financial products or managers utilised by the Trustee to implement the strategy or strategies. The Trustee may change the underlying financial products at its discretion from time to time.

I understand that neither the Trustee or its related entities guarantees my investment in the Fund or any particular rate of return. I accept that the Trustee shall not be liable for any loss due to any choice of investment option made by myself or the Trustee.

I understand that the Trustee cannot provide me with advice that takes into account my personal situation, objectives or needs and that if I require such advice I should consult an appropriately licensed or authorised financial adviser.

I understand that if I have selected investment options without any professional advice regarding my own circumstances or I have chosen not to provide all the information required by my advisor or I have chosen to take up an option(s) that differs from my adviser's recommendations, I may be making investment decisions or a financial commitment in respect to my superannuation based on my own views that may not suit my needs.

Signature of applicant

Date

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For further information

Phone 1300 366 508

Fax 1300 665 403

info@smartpension.com.au

www.smartpension.com.au

Please return this form to
SMARTpension
Locked Bag 5042
Parramatta NSW 2124

SMART
pension