

# Pension

## Changing your investment options



### This form is for use by members with a Retirement Pension or a Transition to Retirement Pension.

You can change how your super is invested in REI Super at any time. Simply choose the investment options available to you as shown in your Product Disclosure Statement or other documentation provided in relation to investment choice. If you nominate invalid investment options or if you provide any information that is incomplete or ambiguous in the opinion of the Trustee, your request will not be actioned. You will be advised if this is the case.

Forms received by the Fund Administrator by 5.00 pm (Melbourne) on Tuesday will be processed at the next declared unit price, which is generally available on the following Friday. Forms received after 5.00 pm (Melbourne) on Tuesday will be held and processed in the week after the form is received.

If you're unsure of your decisions we recommend that you see a licensed or appropriately authorised financial adviser. Please refer to your Product Disclosure Statement, or other documentation provided, for details about the investment choices and options available under the Fund.

### If you need help

For assistance call the REI Super Helpline on **1300 134 433**, or refer to [www.reisuper.com.au](http://www.reisuper.com.au).

**\* Indicates fields that MUST be completed.**

**Please print in black or blue pen, in UPPERCASE, one character per box.**

## STEP 1: YOUR DETAILS

*Title											*Date of birth						
<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Ms	<input type="checkbox"/> Miss	<input type="checkbox"/> Dr	<input type="checkbox"/> Other	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
*Surname	<input type="text"/>																
*Given names	<input type="text"/>																
*Residential address	<input type="text"/>																
*Suburb											*State			*Postcode			
Contact telephone number – Business hours						Contact telephone number – After hours											
( <input type="text"/> ) <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	( <input type="text"/> ) <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>						
*Mobile	<input type="text"/>					*Membership number	<input type="text"/>										
*Email address	<input type="text"/>																
Fund name	<input type="text"/>																
R	E	I	S	U	P	E	R	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		

## STEP 2: CHOOSE YOUR INVESTMENT OPTIONS

Complete this step if you would like to choose the default investment strategy. Please refer to the PDS for further information.

- I choose to invest my account balance and future pension payments in the age related default investment strategy. I understand that:
- the default investment strategy applies to my account balance and pension payments
  - my account balance will be rebalanced once a year to align my investments with the age related default investment strategy.

**If you have completed this Step, please read the privacy statement on page 3 and then sign the form in Step 4. You do not need to complete any information in 'Step 3 - Choose your own investment options'. Your pension payment drawdown strategy will be established in line with the default strategy. Please refer to the PDS for further information.**



# Pension Changing your investment options cont...

## STEP 3: CHOOSE YOUR INVESTMENT OPTIONS

Complete this step if you would like to choose your own investment options. Do not complete this section if you have selected to invest in the default investment strategy by completing Step 2 above.

You can choose up to 9 investment options for your account balance only, pension payments only or both account balance and pension payments.

Please note that if you are in the age related default investment strategy, and you make a selection under Step 3, you will cease to be in the default investment strategy. This means that an annual rebalance of your account balance will no longer occur. Refer to your Product Disclosure Statement for further details.

### Account Balance

You can choose up to 9 investment options in any percentage. Please ensure the total adds to 100% otherwise this form will not be processed and your investment allocations will remain unchanged.

### Pension Payments

If you do not complete this section of the form, payments will be drawn in the same proportions as your account balance.

#### Option 1 - Same Investment Options as Account Balance

Please make payments in the same proportions as my account balance.

#### Option 2 - Nominate Investment Options for Pension Payments

You can choose to have your pension payments made from one or more of the investment options you have chosen above for your account balance. For example, if your account is invested 80% Growth and 20% Balanced, you could choose to have your payments made from the Balanced option only.

Once there's no longer enough money in your chosen option(s), payments will automatically be deducted from the account balance invested in your other option(s). You'll be notified at the time, and can adjust your investment choice if desired.

Percentage to be invested

Growth				%
Balanced				%
Stable				%
Cash				%
Australian Shares				%
International Shares				%
Australian Property				%
Global Property				%
Bonds				%
<b>TOTAL</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>%</b>

Percentage to be invested

Growth				%
Balanced				%
Stable				%
Cash				%
Australian Shares				%
International Shares				%
Australian Property				%
Global Property				%
Bonds				%
<b>TOTAL</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>%</b>

## YOUR PRIVACY

The Fund is administered by us along with our service provider, Mercer Outsourcing Australia Pty Ltd (Mercer). We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information about the other products and services offered by us and our related companies. If you do not wish to receive marketing material, please contact us on **1300 13 44 33**.

Our Privacy Policies are available to view at [reisuper.com.au](http://reisuper.com.au) or you can obtain a copy by contacting us on **1300 13 44 33**.

If you do not provide the personal information requested, we may not be able to manage your superannuation.

We may sometimes collect information about you from third parties such as your employer, a previous super fund, your financial adviser, our related entities and publicly available sources.

We may disclose your information to various organisations in order to manage your super, including your employer, our professional advisers, insurers, our related companies which provide services or products relevant to the provision of your super, any relevant government authority that requires your personal information to be disclosed, and our other service providers used to assist with managing your super. In managing your super your personal information will be disclosed to service providers in another country, most likely to Mercer's processing centre in India. Our Privacy Policies list all other relevant offshore locations.

Our Privacy Policies set out in more detail how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact us on **1300 13 44 33** or write to our Privacy Officer, GPO Box 4303, Melbourne VIC 3001.



# Pension Changing your investment options cont...

## ▶ STEP 4: SIGN THE FORM

By signing this form I understand that:

- forms received by the Trustee by 5.00 pm (Melbourne) on Tuesday will be processed at the next declared unit price, which is generally available on the following Friday. Forms received after 5.00 pm (Melbourne) on Tuesday will be held and processed in the week after the form is received
- the Trustee's administrator will not action my request if the information is incomplete or ambiguous
- a buy/sell spread may apply to some investment options and a cost will apply on switching into any such option
- I consent to my information being collected, disclosed and used in the manner set out in this form.

\*Signature

\*Date

 /  / 

## ▶ READY TO SEND US YOUR FORM?

Once you have completed and signed this form, please either:

**Post: GPO Box 4303 Melbourne VIC 3001**

**Email: [admin@reisuper.com.au](mailto:admin@reisuper.com.au)**

## ▶ WE'RE HERE TO HELP

If you need any assistance with filling out this form, or have any questions about super, please feel free to call us on **1300 13 44 33**.

