Changing your investment options –Pension

REI Super | 50 YEARS

THIS FORM IS FOR USE BY MEMBERS WITH A RETIREMENT PENSION OR A TRANSITION TO RETIREMENT PENSION.

You can change how your pension account is invested in REI Super and/or how pension payments will be drawn down at any time. Simply choose from the investment options available to you as shown in the latest REI Super Pension Product Disclosure Statement (including Supplementary Product Disclosure Statement, if applicable) 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 before midnight (AEST/AEDT) on Tuesday will be processed at the next declared unit price, which is generally available on the following Friday. Forms received after midnight (AEST/AEDT) 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 the latest Product Disclosure Statement, or other documentation provided, for details about the investment choices and options available to pension accounts in the Fund.

If you need help

For assistance call the REI Super Helpline on **1300 134 433**, or refer to **www.reisuper.com.au**.

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

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

PART 1: YOUR DETAILS

☐ Mr ☐ Mrs ☐ Ms ☐ Miss ☐ Dr Other

Member number

Given names

Surname

Date of Birth (DD-MM-YYYY)

Residential address

Suburb

State

Postcode

Postal address. If the same as your residential address, mark ✗ in this box. ☐

Suburb

State

Postcode

Mobile phone

Home phone ( )

Email

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REIS 10184

Pension Changing your investment options cont...

PART 2: IF YOU WISH TO CHOOSE THE AGE RELATED DEFAULT INVESTMENT OPTION

Complete this step if you would like to choose the age related default investment strategy. Please refer to the Product Disclosure Statement for further information.

☐ I choose to invest my account balance in, and draw down future pension payments in accordance with, 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 Product Disclosure Statement for further information.

PART 3: IF YOU WISH TO CHOOSE OTHER 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 10 investment options for the investment of your account balance only, the drawdown of your pension payments only or both the investment of your account balance and drawdown of 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 10 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.

	Percentage to be invested
Growth Plus	%
Growth	%
Balanced	%
Stable	%
Cash	%
Australian Shares	%
International Shares	%
Australian Property	%
Global Property	%
Bonds	%
TOTAL	1 0 0 %

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 Plus	%
Growth	%
Balanced	%
Stable	%
Cash	%
Australian Shares	%
International Shares	%
Australian Property	%
Global Property	%
Bonds	%
TOTAL	1 0 0 %

Pension Changing your investment options cont...

YOUR PRIVACY

The Fund is administered by us along with our service provider, SS&C Bluedoor Pty Limited (SS&C). 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/privacy-policy** 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 toSS&C'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, **PO Box 832, Newcastle NSW 2300.**

PART4: SIGN THE FORM

By signing this form I declare that I understand or acknowledge the following:

- forms received by the Trustee before midnight (AEST/AEDT) on Tuesday will be processed at the next declared unit price, which is generally available on the following Friday. Forms received after midnight (AEST/AEDT) on Tuesday will be held and processed in the week after the form is received
- I have obtained and read the latest Pension Product Disclosure Statement (and Supplementary PDS if applicable) before making my investment choice including information about investments, risks and fees and costs
- 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 or any rebalancing under the default investment strategy
- I have read and understood the Privacy Policy which is available at reisuper.com.au/privacy-policy and I consent to my personal information being collected and used by REI Super in accordance with this privacy policy.
- investment returns are not guaranteed, and the value of my investment in the Fund may rise or fall
- fees and costs apply to my participating in the Fund.

*Signature

✗

*Date

/ /

READY TO SEND US YOUR FORM?

Once you have completed and signed this form, please either:
Post: PO Box 832, Newcastle NSW 2300
Email: 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**.

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