

investment choice form

Making an investment choice is easy!

There are two ways to make your first investment choice or switch an existing investment choice:

1. **Online** – Log in to your MemberOnline account and go to the 'Investments' section. If you haven't already registered for MemberOnline, visit caresuper.com.au/register to get started.

2. **Complete this form** in blue or black pen and in block letters, then return it to the address on the back. The instructions you provide on this form override any previous instructions you have given to CareSuper.

Please tick (✓) one box only.



If you are a new member and would like to make your investment choice for your future contributions, go to section 3.

Please fill out the percentage of your existing balance you would like invested in each option.



Important

Take care that your investment choices add up to 100%.

1. Your personal details

CareSuper member number (if known)	Date of birth (DD/MM/YYYY)	Title
<input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/>
Surname		
<input type="text"/>		
Given names		
<input type="text"/>		
Address (residential)		
<input type="text"/>		
Suburb/town	State/Territory	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Telephone (home)	Telephone (work)	
<input type="text"/>	<input type="text"/>	
Mobile number	Email address	
<input type="text"/>	<input type="text"/>	

2. Investment of existing balance

Important: This section relates to the balance of your CareSuper account on the date we receive this form. Please do not complete this section if you are a joining or new member, or if you currently do not have a balance in your CareSuper account. Please go to the 'Investment of future contributions' section overleaf. Please select the option or combination of options in which you wish to invest your existing account balance. Take care that your selection adds up to 100%. Use only whole numbers (no fractions).

- I do not wish to change the way my existing balance is currently invested. Please go to Section 3.
- I would like my existing balance invested/switched in the way I have listed below.

You can invest your existing balance in **one or a combination** of CareSuper's investment options.

Managed options	Your investment choice	Example only
<input type="checkbox"/> Capital Guaranteed	<input type="text"/> %	<input type="text"/> %
<input type="checkbox"/> Capital Stable	<input type="text"/> %	<input type="text"/> %
<input type="checkbox"/> Conservative Balanced	<input type="text"/> %	6 0 %
<input type="checkbox"/> Balanced (MySuper)	<input type="text"/> %	<input type="text"/> %
<input type="checkbox"/> Sustainable Balanced	<input type="text"/> %	<input type="text"/> %
<input type="checkbox"/> Alternative Growth	<input type="text"/> %	<input type="text"/> %
<input type="checkbox"/> Growth	<input type="text"/> %	<input type="text"/> %
Asset Class options		
<input type="checkbox"/> Capital Secure	<input type="text"/> %	<input type="text"/> %
<input type="checkbox"/> Fixed Interest	<input type="text"/> %	2 0 %
<input type="checkbox"/> Direct Property	<input type="text"/> %	2 0 %
<input type="checkbox"/> Australian Shares	<input type="text"/> %	<input type="text"/> %
<input type="checkbox"/> Overseas Shares	<input type="text"/> %	<input type="text"/> %
<input type="checkbox"/> Direct Investment option*	Only available through MemberOnline	
Total (must equal 100%):	1 0 0 %	1 0 0 %

* Please read the important note about the Direct Investment option overleaf.

See over >

3. Investment of future contributions



I would like my future contributions invested in the way I have listed below

I do not wish to change the way my future contributions are currently invested

You can invest your future contributions in one or a combination of CareSuper's investment options.

Take care that your selection adds up to 100%. Use only whole numbers (no fractions).

Please fill out the percentage you would like applied to future contributions.



Managed options	Your investment choice	Example only
<ul style="list-style-type: none"> Capital Guaranteed 	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> %
<ul style="list-style-type: none"> Capital Stable 	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> %
<ul style="list-style-type: none"> Conservative Balanced 	<input type="text"/> <input type="text"/> <input type="text"/> %	60 %
<ul style="list-style-type: none"> Balanced (MySuper) 	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> %
<ul style="list-style-type: none"> Sustainable Balanced 	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> %
<ul style="list-style-type: none"> Alternative Growth 	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> %
<ul style="list-style-type: none"> Growth 	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> %
Asset Class options		
<ul style="list-style-type: none"> Capital Secure 	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> %
<ul style="list-style-type: none"> Fixed Interest 	<input type="text"/> <input type="text"/> <input type="text"/> %	20 %
<ul style="list-style-type: none"> Direct Property 	<input type="text"/> <input type="text"/> <input type="text"/> %	20 %
<ul style="list-style-type: none"> Australian Shares 	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> %
<ul style="list-style-type: none"> Overseas Shares 	<input type="text"/> <input type="text"/> <input type="text"/> %	<input type="text"/> %
Total (must equal 100%)	100 %	100 %



If you have already submitted one **Investment choice** form for the week and wish to change your instructions, please contact the CareSuperLine on 1300 360 149.

You must sign and date this form.



Return this completed form to:

CareSuper
Locked Bag 5087
Parramatta NSW 2124

For more information call the CareSuperLine

1300 360 149



4. Member declaration

I have obtained, read and understood the applicable current **Product Disclosure Statement (PDS)**, including the incorporated **Investment Guide** and **Fees and other costs** information. I understand CareSuper can provide me with general information but cannot give me investment advice, and that the PDS is only a general guide and not a substitute for professional investment advice.

I understand that if I make an investment choice and switch all or part of my account to a different investment option(s), the benefits, features and services available through my CareSuper account do not change. I am aware that CareSuper's legal obligations regarding how the MySuper (Balanced) option is managed are different to those for the Fund's other investment options. The superannuation laws specific to this option are intended to ensure the Trustee has a greater responsibility for members who do not make an investment choice.

Member's signature

Date (DD/MM/YYYY)

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I understand that I can change (switch) my investments as frequently as weekly. If I lodge my application to switch with CareSuper before 5pm (AEST) Friday for written requests, or before midnight (AEST) Friday for online requests, my new investment strategy will usually be processed on the following Wednesday.

I understand that CareSuper is not responsible for my choice of investment strategy.

I understand that funds to cover investment choice switches are deducted pro rata across my other investments (excluding the Direct Investment option) to the value of the switch.

Important note about the Direct Investment option

To invest in the Direct Investment option (if eligible), please log in to your MemberOnline account and go to the 'Investments' section. If you haven't already registered for MemberOnline, visit caresuper.com.au/register to get started. You must maintain a valid email address in your MemberOnline account to access the Direct Investment option. We do not accept written transaction requests for the Direct Investment option. To find out more about the Direct Investment option, including the eligibility criteria, please read your applicable current **Product Disclosure Statement**, available at caresuper.com.au/PDS.