



# investment choice form

Pension

To make your first investment choice or to switch an existing investment choice, please complete all sections of this form and return it to CareSuper. The instructions you provide on this form override any previous instructions you have given to CareSuper. Please complete the form in blue or black pen and in block letters.

\* If you're starting a new Pension account or you don't know your CareSuper Pension account number, please leave this space blank.

Please tick (✓) one box only.

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

### 1. Your current member details

CareSuper pension member number (if known)\*      Date of birth (DD/MM/YYYY)      Title

→  /  /      

Surname

Given names

Address (residential)

Suburb/town      State      Postcode

Telephone (home)      Telephone (work)

Mobile number      Email address

### 2. Making an investment choice

**Important:** this section relates to the balance of your CareSuper account on the date we receive this form. Your investment switch will be processed in the next switch cycle after your pension account has been set up.

**For new CareSuper members:**

→  I would like my new CareSuper pension account to be invested in the way I have selected below. Please go to section 3 to nominate your pension payment details.

**For existing CareSuper members:**

I want my new Pension account to be invested in the same way as my current CareSuper account. If this is the case, you do not need to complete this section. Go directly to section 3 where you can choose which option(s) you want your pension payments to be drawn from.

I would like my existing balance invested/switched in the way I have listed below.

If you're currently invested in the Direct Investment option through a CareSuper superannuation account, you may be able to transfer your DIO investments directly to a new CareSuper Pension account. Please read the information on page 33 of this Guide to find out more.

The Direct Investment option is not available for TTR members of the CareSuper Pension. If you're starting an account with us, you cannot invest in the Direct Investment option. More information is on page 32 of this Guide.

You can invest your CareSuper pension account 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"/>                 | 60 <input type="text"/>  |
| <input type="checkbox"/> Balanced                  | <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"/>                 | 20 <input type="text"/>  |
| <input type="checkbox"/> Direct Property           | <input type="text"/>                 | 20 <input type="text"/>  |
| <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 PensionOnline |                          |
| <b>Total (must equal 100%):</b>                    | 100 <input type="text"/>             | 100 <input type="text"/> |

\* Please read the important note about the Direct Investment option on the next page

**i**  
**Important**

Take care that your investment choices add up to 100%. Use only whole numbers (no fractions.)

Detach here ▶

### 3. Pension payment details

I have a CareSuper Pension account. I would like my **future** pension payments to be drawn in the way I have listed in section 4 below.

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

### 4. Where will your pension payments be drawn from?

Please fill out the percentage of each investment option from which you would like your future pension payments drawn.

Pension payments cannot be drawn from investments in the Direct Investment option.

| Managed options                             | Your investment choice  | Example only           |
|---|---|------------------------|
| <input type="radio"/> Capital Guaranteed    | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % | <input type="text"/> % |
| <input type="radio"/> Capital Stable        | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % | <input type="text"/> % |
| <input type="radio"/> Conservative Balanced | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % | 60 %                   |
| <input type="radio"/> Balanced              | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % | <input type="text"/> % |
| <input type="radio"/> Sustainable Balanced  | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % | <input type="text"/> % |
| <input type="radio"/> Alternative Growth    | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % | <input type="text"/> % |
| <input type="radio"/> Growth                | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % | <input type="text"/> % |
| Asset Class options                         |   |                        |
| <input type="radio"/> Capital Secure        | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % | <input type="text"/> % |
| <input type="radio"/> Fixed Interest        | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % | 20 %                   |
| <input type="radio"/> Direct Property       | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % | 20 %                   |
| <input type="radio"/> Australian Shares     | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % | <input type="text"/> % |
| <input type="radio"/> Overseas Shares       | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> % | <input type="text"/> % |
| <b>Total (must equal 100%)</b>              | <b>100 %</b>  | <b>100 %</b>           |

### 5. Member declaration

If you have already submitted one **Investment choice** form for the week and wish to change your instructions, please contact the CareSuper PensionLine on **1300 664 781**.

I have read and understood the **Pension PDS**.

I understand CareSuper can provide me with general information but cannot give me investment advice, and that the **Pension PDS** is only a general guide and not a substitute for professional investment advice.

I have read, and understand, the investment switching cycle detailed in the PDS and that my investment choices will be actioned within those timeframes. Special rules apply to switches relating to the Direct Investment option.

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

I understand that funds to cover investment choice switches to/from Managed and/or Asset Class options are deducted pro rata across my other investments to the value of the switch.

Member's signature

Date (DD/MM/YYYY)

 /  / 

You must sign and date this form.



Return this completed form to:  
**CareSuper Pension**  
**Locked Bag 5042**  
**Parramatta NSW 2124**  
 For more information call the CareSuper PensionLine  
**1300 664 781**

#### **!** Important note about the Direct Investment option

To invest in the Direct Investment option, please log on to your PensionOnline account and go to the 'Investments' section. If you haven't already registered for PensionOnline, visit [caresuper.com.au/register](https://caresuper.com.au/register) to get started. Pension payments cannot be drawn from the Direct Investment option. You must maintain a valid email address in your PensionOnline 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 the **Pension Guide PDS**.

Members are unable to access the Direct Investment option while in a transition to retirement strategy.