

Member Investment Choice

Please call us on **1300 362 415** if you require any assistance.

Please complete this form using CAPITAL LETTERS

Use this form to choose or change (switch) the investment option for your existing account balance, your future contributions, or both.

The instructions you provide on this form override any previous instructions you have given to MTAA Super. Please read the Important Information at the end of this form before completing.

Section A

Member details

MTAA Super member number (if known)

Are you a new member? Yes No

Given name/s

Family name

Date of birth

Mr Mrs Ms Miss Other

Street address

Suburb

State

Postcode

Telephone (business hours)

Mobile

Email

Section B

Existing account balance *(existing members only)*

Please select the option or combination of options you want to invest your existing account balance in.

I do not wish to change the way my existing balance is currently invested. (Go to Section C)

I would like my existing balance invested/switched as listed below

I direct that my existing account balance be invested in the following investment option/s in the proportions indicated:

Investment option	Proportion (%)
Conservative	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Income-Focussed	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
My AutoSuper (Balanced)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Growth	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Cash	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Diversified Fixed Interest	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Australian Shares	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
International Shares	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
TOTAL	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Total proportions must add up to 100%.



Section C

Future contributions, rollovers and other amounts transferred in

- I would like my future contributions invested in the same way as indicated in Section B. (Go to Section D)
- I do not wish to change the way my future contributions are currently invested. (Go to Section D)
- I would like my future contributions to be invested as listed below

I direct that future amounts received into my account are to be invested in the following investment option/s in the proportions indicated:

Investment option	Proportion (%)
Conservative
Income-Focussed
My AutoSuper (Balanced)
Growth
Cash
Diversified Fixed Interest
Australian Shares
International Shares
TOTAL

Total proportions must add up to 100%.

If you do not complete Section C, your future contributions will be invested in the same percentages you have indicated in Section B.

Section D

Member declaration

- I understand that MTAA Super has advised me to obtain professional financial advice and that the MTAA Super *Member Product Disclosure Statement (PDS)*, which I have read and understood, is a general guide and does not constitute investment advice.
- I acknowledge having read and understood the privacy information in the *Member PDS* and the Privacy Policy available at mtaasuper.com.au/privacy or otherwise provided, and consent to personal information being collected and used in accordance with these terms.
- I understand that neither the Trustee nor my employer is responsible for, or able to influence, the investment performance of any of the appointed managers.
- I advise that neither the Trustee, my employer nor MTAA Super has influenced my investment choice.
- I acknowledge that the Trustee expressly disclaims all and any liability for any investment decisions taken by me.
- I acknowledge that the Trustee can change its investment strategies, managers or underlying investments at any time.
- I understand that the total proportions of the options I have chosen must add up to 100%.
- I understand that all conditions are subject to variation from time to time at the discretion of the MTAA Super Trustee.
- I understand that if there are insufficient funds to cover deductions in the investment option/s I have nominated for future contributions, deductions will be taken from the balances of any other investment option in which I am invested.
- I understand that switching applications for my existing account balance received before 11.59pm Sydney time, will be effective two business days after the request is received, using the most recent unit price/s available. A business day is any day that is not a weekend or national public holiday.
- I understand that this application for my future contributions will take effect from the date the application is received by the Fund.
- I understand that if I do not complete Section B, my existing account balance will be invested in accordance with my previously advised investment choice or, where I have not previously made an investment choice, in the My AutoSuper (Balanced) option.
- I understand that if I do not complete Section C, my future contributions will be invested in the same percentages I indicated for my existing account balance (Section B)

Signature

Date

This application has no effect until it is fully completed, signed, dated, and lodged with MTAA Super.

Return this completed, signed, and dated application to:

**MTAA Super
Locked Bag 5134
Parramatta NSW 2124**

Important information

How often can I change my investment choice?

You can apply to change your investment as often as you like at no charge. You can do this by either:

- logging into your account via Member SuperSite at **mtaasuper.com.au/member-login**,
- completing this form and sending it to us, or
- calling us on **1300 362 415**.

When does the change take effect?

For changes to your existing account balance:

Switching applications will take effect two business days after the request is received. Applications received on Friday, Saturday or Sunday, prior to 11.59pm Sydney time will be effective Tuesday. Switching applications received on a Monday prior to 11.59pm Sydney time will be effective on a Wednesday.

For changes to future contributions:

This will take effect from the date the instructions are received by MTAA Super. There is no switching fee applied to these changes.

What happens if I do not make an investment choice?

If you do not make an investment choice, your existing account balance and all future contributions, earnings and rollovers will be invested in the My AutoSuper (Balanced) option (default).

If the default investment option is your preferred investment option, you do not need to complete this form.

Need help?

For help choosing or changing your investment option, call us on **1300 362 415**.

Email contact@mtaasuper.com.au

Postal address Locked Bag 5134, Parramatta NSW 2124

Trustee Motor Trades Association of Australia Superannuation Fund Pty. Limited
ABN 14 008 650 628 AFSL 238 718

Fund MTAA Superannuation Fund ABN 74 559 365 913

mtaasuper.com.au

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