

Pension Investment Choice

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

Please complete this form using CAPITAL LETTERS

Complete this form to make an investment switch or to reset the asset allocation in your MTAA Super Pension. Switching is subject to the conditions outlined on page 17 in the *Pension Handbook*.

Note: this form is for pension accounts only. If you would like to make an investment switch for your super account, please refer to the *Member Product Disclosure Statement*.

Section A

Member details

MTAA Super Pension number (if known)

Given name/s

Family name

Date of birth **Mr Mrs Ms Miss Other**

Street address

Suburb **State** **Postcode**

Telephone (business hours) **Mobile**

Email

I direct the trustee to invest my MTAA Super Pension account balance in the proportions indicated below.

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

Total proportions must add up to 100%.



Section B

Ongoing pension payment details

Please indicate how you would like to draw down your pension payments by selecting one of the following methods. If no selection is made, the default option is the 'Pro-rata method'

Proportional method

You can specify the proportion to be withdrawn from each of the investment options you selected in Section A.

Investment option

Proportion (%)

Conservative

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Income-Focussed

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Balanced

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Growth

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Cash

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Diversified Fixed Interest

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Australian Shares

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International Shares

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Total proportions must add up to 100%.

TOTAL

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Priority method

If you have selected more than one investment option in Section A, you can specify the order of investment options from which your pension payments are drawn down. Number options from 1–8 for ALL corresponding options nominated in Section A.

Conservative

Income-Focussed

Balanced

Growth

Cash

Diversified Fixed Interest

Australian Shares

International Shares

Pro-rata method (default)

You can elect to have the pension payments withdrawn from each investment option that you selected in Section A, in proportion to the balance in each investment option at the time of withdrawal.

Section C

Member declaration

- I understand that MTAA Super has advised me to obtain professional financial advice and that the MTAA Super *Pension Handbook*, 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 *Pension Handbook* 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 the Trustee is not responsible for, or able to influence, the investment performance of any of the appointed managers.
- I advise that neither the Trustee, nor MTAA Super has influenced my investment choice selection.
- 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, including fees are subject to variation from time to time at the discretion of the MTAA Super Trustee.
- 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 NSW public holiday.
- I understand that if I do not complete Section A, my existing account balance will be invested in the default option or as otherwise nominated by me previously.

Member signature

Date

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

Return the completed, signed and dated application to:

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