

# Change your investment options

## M09 - Accumulation account



right by your side

**You can switch investment options quickly and easily using Member online. Simply log in and click Investments – Change investments.**

Alternatively, please complete and email this form back if you want to:

- Change your existing balance to a different investment option(s) for your Accumulation account.
- Change the investment allocation for your future contributions and allocations.
- Initiate, change or cancel auto-rebalancing for your investment strategy.

### Personal Details Brighter Super respects your privacy. All personal information collected is protected in line with Brighter Super's Privacy policy.

<b>Member number</b>	<b>Account number</b>	<b>Given name(s)</b>	
<b>Surname</b>			<b>Date of birth</b> / /
<b>Email</b>	<b>Phone number</b>		
<b>Residential address</b>			
<b>Suburb/town</b>	<b>State</b>	<b>Postcode</b>	
<b>Postal address (if different to above)</b>	<b>State</b>	<b>Postcode</b>	

## Important information

### 1. Investment options

You can switch investment options as many times as you like each financial year without cost. If you do not indicate a change to your investment options in the table on the next page for either your current balance or future contributions we will take that to mean that you wish to continue with the option(s) you currently have recorded on your account. If you have not previously indicated a preference, your balance or contributions are invested in the MySuper option, and will remain invested in that option unless you indicate to change it on this form.

### 2. Effective switch date

If your valid request is received before 3pm (AEST) on a business day it will take effect on the same business day. Any requests received after 3pm (AEST) will take effect on the following business day. Your investment switch will, in most cases, be reflected on your account within 2 working days after we receive your application.

A business day is defined as a day between Monday and Friday which is not an Australian national public holiday. Only one investment switch will be accepted for an account on any given day. See the *Investment choice guide* for more details.

### 3. Personal information

Brighter Super respects your privacy. All personal information collected on this form is protected in line with *Brighter Super's Privacy Policy*. To find out more about how we collect and manage your personal information, please refer to our *Privacy Policy* available from our website [brightersuper.com.au](http://brightersuper.com.au).

## 1 What would you like to do?

Please tick (✓) the box and indicate your choice(s) below.

- I would like change both my current balance and future contributions (section 2 & 3).
- I would like change only my current balance (section 2).
- I would like to elect to have my investments auto re-balanced each year (section 4).
- I would like to cancel or change my previous election to auto re-balance my investments each year (section 4).

If you hold more than one account please specify below which account(s) you would like the changes to apply to.

Account number(s): \_\_\_\_\_

## 2 Transfer my existing balance

Please complete this section if you are wanting to change the investment strategy for your existing Accumulation account balance.

**Use whole percentages and values only. Percentages must total 100%.**

MySuper option	Percentage
MySuper	%
<b>Ready-made options</b>	
Growth	%
Indexed Balanced	%
Balanced	%
Conservative Balanced	%
Stable	%
Secure	%
<b>Socially responsible options</b>	
Socially Responsible	%
Socially Responsible Australian Shares	%
<b>Single asset class options</b>	
International Shares	%
Australian Shares	%
Property	%
Diversified Fixed Interest	%
Cash	%
<b>TOTAL</b>	<b>100%</b>



### Did you know?

**With Member online, you can also:**

- Update your details so we have your personal email and not your work address.
- Switch investment options
- Review your insurance; and more.

**Visit** [memberonline.brightersuper.com.au/login](https://memberonline.brightersuper.com.au/login)

### 3 Transfer my future contributions

Please complete this section if you are wanting to change the investment strategy for your future contributions.

If you do not indicate an investment preference below, your future contributions will be invested according to your existing option(s) for future contributions. Your contributions tax and insurance premiums will be deducted proportionately from these options.

**Use whole percentages only. Percentages must total 100%.**

MySuper option	Percentage
MySuper	%
<b>Ready-made options</b>	
Growth	%
Indexed Balanced	%
Balanced	%
Conservative Balanced	%
Stable	%
Secure	%
<b>Socially responsible options</b>	
Socially Responsible	%
Socially Responsible Australian Shares	%
<b>Single asset class options</b>	
International Shares	%
Australian Shares	%
Property	%
Diversified Fixed Interest	%
Cash	%
<b>TOTAL</b>	<b>100%</b>

### 4 Auto-rebalance your investment strategy

Please tick (✓) the applicable box below if you wish to have your investments automatically re-balanced.

- I wish to have my investments automatically re-balanced each quarter.
- I wish to have my investments automatically re-balanced half yearly.
- I wish to have my investments automatically re-balanced annually.
- I wish to cancel my previous election to automatically re-balance my investment strategy.

If you have elected to automatically re-balance your investments, we will re-balance your investments by switching them back into the percentage options you last chose. You can opt out of this choice at any time. Please refer to the *Investment choice guide*.

## 5 Member declaration

Please tick (✓) the boxes to confirm you have read and understood the information relating to your investment switch.

- I understand if I complete this form and only have a Pension account my request will be invalid and I will need to complete the relevant form for Pension accounts.
- I understand my switch will take effect on the same business day after submitting a valid request, provided this is received on a business day before 3pm (AEST).
- I understand that if this form is incomplete the Fund will not be able to process my request.
- I understand that the unit price to value my investment switch has not yet been calculated, as outlined in the *Investment choice guide* and will be dependent on the date my request is considered received.
- I am aware there are rules about cancelling my request.
- I am aware that if required, I can contact Brighter Super for more information before completing this form.

Signature

Date signed

/ /

Please sign in blue or black pen - Brighter Super does not accept digital signatures on this form.

## 6 Power of Attorney signature

Complete this section if you are signing this form on behalf of the member in your capacity as the member's attorney.

By signing this form you are declaring that:

- you are nominated as an attorney on the member's Power of Attorney document and are authorised to act on the member's behalf for financial matters; and
- to the best of your knowledge and belief your appointment under the Power of Attorney document has not been revoked or otherwise withdrawn.

If more than one attorney has been appointed all attorneys will need to print their name, sign and date the form unless authorised to act severally.

Attorney 1	Signature	Date signed / /
Attorney 2	Signature	Date signed / /
Attorney 3	Signature	Date signed / /
Attorney 4	Signature	Date signed / /

Please sign in blue or black pen - Brighter Super does not accept digital signatures on this form.

Please (✓) one of the options below:

- I have attached valid Power of Attorney documentation<sup>1</sup>.
- I have previously supplied a valid Power of Attorney document to Brighter Super.

Now you have completed this form and signed the declaration, please send it to us by:

### Preferred Method

Website (Secure file upload)  
[brightersuper.com.au/contact-us](http://brightersuper.com.au/contact-us)

### Alternative Options

Email (scanned copy)  
[membership@brightersuper.com.au](mailto:membership@brightersuper.com.au)

Post  
Brighter Super  
GPO Box 264  
Brisbane QLD 4001



<sup>1</sup> For a Power of Attorney (PoA) to be accepted, we require the forms to be posted through to us at GPO Box 264, Brisbane QLD 4001. Please ensure your documents have been certified on each page, and you have included certified ID for the attorney(s) nominated in the PoA, see our Proof of identity requirements information at [brightersuper.com.au](http://brightersuper.com.au) for more details.