

## Changing your investment options

You can change how your super is invested in ANZ Staff Super. Simply choose from the investment options available to you as shown in your Product Disclosure Statement or other documentation provided in relation to investment choice.

If your choice is incomplete or ambiguous in the opinion of the Trustee, your request will not be actioned. You will be advised if this is the case.

You can use this form to change the investment option(s) for your existing account balance and any future cashflow to your account.

You can also submit your change electronically via the secure section of **anzstaffsuper.com** – under the ‘Your Investments’ tab or call ANZ Staff Super on **1800 000 086** to request a change.

You may have accounts in more than one Section of ANZ Staff Super if, for example, you have an employee member account in the Employee Section and a Transition to Retirement Account Based Pension in the Retirement Section. **If you have more than one account, you will need to complete a separate *Changing your investment options* form for each account.**

If you don't know which Section your account is in, log into the secure section of **anzstaffsuper.com** and check in “Your personal details”, refer to your latest statement or call ANZ Staff Super on **1800 000 086**.

If you're unsure of your decision we recommend that you consult a licensed or appropriately authorised financial adviser.

### If you need help

For assistance call ANZ Staff Super on **1800 000 086**, or go to **anzstaffsuper.com**.

### Step 1 – Complete your personal details

Please print in black or blue pen, in uppercase, one character per box.



Title Mr  Mrs  Ms  Miss  Other    Date of birth   /   /

Given names

Surname

Postal address

Suburb                      State    Postcode

Daytime Telephone           Mobile

E-mail

Membership number

Continued over

Please return your completed form to:  
ANZ Staff Super  
GPO Box 2139  
Melbourne VIC 3001

## Step 2 – Nominate which account your change in investments request applies to

This investment switch request applies to my account in the  Section.

## Step 3 – Choose your investment options for your existing account balance

You can choose one or a combination of the four investment options#. Please ensure that all the percentages add to 100%. At the next Switch Date\* I wish to have my existing account balance invested as follows:

	Percentage to be invested		
<input type="text"/> Aggressive Growth	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/> Balanced Growth	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/> Cautious	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/> Cash	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<b>TOTAL</b>	<b>1</b>	<b>0</b>	<b>0</b> %

## Step 4 – Choose your investment options for future cashflow

You can choose one or a combination of the four investment options#. Please ensure that the percentages add to 100%. At the next Switch Date\* I wish to have future cashflow applied to my investments in ANZ Staff Super as follows:

in the same option(s) as indicated above (Step 3)

**OR**

	Percentage to be invested		
<input type="text"/> Aggressive Growth	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/> Balanced Growth	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/> Cautious	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<input type="text"/> Cash	<input type="text"/>	<input type="text"/>	<input type="text"/> %
<b>TOTAL</b>	<b>1</b>	<b>0</b>	<b>0</b> %

\* 'Switch Date': If your *Changing your investment options* form is received by 11pm (AEST/AEDT) on a business day it will be held for three business days before processing. The request will be processed using the unit price in the administration system on the day the switch is processed, which will generally be derived from valuations at close of business three days earlier. Switch requests received after 11pm (AEST/AEDT) on a business day will be treated as having been received on the following business day. Public holidays may disrupt the daily unit pricing cycle. Generally, unit prices won't be calculated on Victorian public holidays. Switches will be processed on the next available business day using the price in the administration system (providing requests have been held for at least three business days).

# If you are currently classified as a MySuper member and therefore 100% of your account balance is invested in the Balanced Growth investment option (i.e. the default investment option), any request to change to another investment option will mean that you will be classified as a Choice member from the Switch Date\*. For further details, refer to the Product Disclosure Statement applicable for your section of membership of ANZ Staff Super.

## Protecting members' privacy

The Trustee, ANZ Staff Superannuation (Australia) Pty Limited, seeks to take all reasonable steps to protect members' privacy and the confidentiality of members' personal information.

The administrator, Australian Administration Services Pty Limited, collects (on behalf of the Trustee) personal information directly from members and their employers. Sometimes information about you may be collected from other third parties such as a previous superannuation fund, your financial adviser or publicly available sources. We collect, use and disclose personal information about you to provide and manage your account and give you information about your super, or as required by super and tax laws.

If you do not provide the personal information requested or it is incomplete or inaccurate, we may not be able to manage your account properly and processing of transactions to, from or in relation to your account may be delayed.

Members' personal information is kept confidential but may be disclosed by the Trustee or administrator to third parties, such as ANZ Staff Super's actuary, insurer, medical consultants, underwriter, legal adviser and auditor and other external service providers who are contracted to assist with administering members' benefits. It may also be disclosed where expressly authorised or required by law, for example to government agencies such as the Australian Taxation Office and Australian Financial Complaints Authority. Members' personal information may also be disclosed to the Group Superannuation Department of ANZ for the purposes of administering members' benefits or resolving members' enquiries or complaints.

Members' personal information may be disclosed to related entities of the administrator located overseas as part of the day-to-day provision of administration or ancillary services.

The Trustee's Privacy Policy Statement contains more detail about how we deal with your personal information and information about how you can access and seek correction of information we hold about you. It also includes information about how you can lodge a complaint about how we've dealt with your personal information and how that complaint will be handled.

If you have any queries in relation to privacy issues, please contact:

ANZ Staff Super  
Mail: GPO Box 2139  
Melbourne VIC 3001  
Phone: 1800 000 086  
Fax: (02) 9287 0320  
Email: [enquiry@anzstaffsuper.com](mailto:enquiry@anzstaffsuper.com)

The Trustee's Privacy Policy Statement is available on ANZ Staff Super's website [anzstaffsuper.com](http://anzstaffsuper.com) or by calling us on **1800 000 086**. You can also access the administrator's privacy policy on our website.

## Step 5 – Sign the form

By signing this form I understand that:

- if my form is received by 11pm (AEST/AEDT) on a business day it will be held for three business days before processing. The request will be processed using the unit price in the administration system on the day the switch is processed, which will generally be derived from valuations at close of business three days earlier. Valid switch requests received after 11pm (AEST/AEDT) on a business day will be treated as having been received on the following business day. Public holidays may disrupt the daily unit pricing cycle. Generally, unit prices won't be calculated on Victorian public holidays. Switches will be processed on the next available business day using the price in the administration system (providing requests have been held for at least three business days).
- the Trustee's administrator will not action my request if the information or investment choice is incomplete or ambiguous
- the information on this form will be handled by the Trustee and administrator to process my investment option choice
- the Trustee reserves the right to delay processing of my switch request
- the Trustee of ANZ Staff Super is not responsible for my choice of investment strategy and does not guarantee the performance of the investment options
- this *Changing your investment options* form supersedes any previous instructions regarding my investment choice(s) for this account and I understand that I can switch my investment choice in the future by submitting another form or electronic switch request
- if I am currently classified as a MySuper member, making this investment switch will mean that I will be classified as a Choice member from the Switch Date
- I consent to my information being collected, disclosed and used in the manner set out in this form.

Signature

X

Date

/  /

**Please return your completed form to: ANZ Staff Super, GPO Box 2139, Melbourne VIC 3001**  
**Emails and faxes cannot be accepted.**