FuturePlus Super

Account-Based Pension Plan

Selecting or Changing Investment Program

Please complete in capital letters and in BLACK INK only

This form is to be completed if you would like to change your investment program.

1. Your details

Member no. | Date of birth *(dd/mm/yyyy)* / /

Title *(e.g. Mr/Mrs/Ms/Miss/Dr)*

Family name

Given name(s)

Contact Details (postal address, telephone, email)

No./Street/PO Box

Suburb/Town/City

State/Territory | Postcode | Country (if outside Australia)

Phone: Home no. (inc. STD/ISD) | Business no. (inc. STD/ISD)

Mobile no. | Fax no. (inc. STD/ISD)

E-mail address

Residential Address

☐ **Same as Postal Address above**

☐ **Different from Postal Address above – you MUST complete below**

No./Street

Suburb/Town/City

State/Territory | Postcode | Country (if outside Australia)

2. Changing Investment Program

PLEASE COMPLETE ONE OPTION ONLY

☐ **Option 1 – Managed Portfolio Program** (Select only ONE strategy)

- ☐ High Growth Strategy
- ☐ Capital Guarded Strategy
- ☐ Diversified Strategy
- ☐ Cash Strategy
- ☐ Balanced Strategy

☐ **Option 2 – Member Choice Program**
Insert % of benefits and ongoing contributions you choose to invest in the six investment pools totalling 100%

Australian Equities	%
Australian Fixed Income	%
International Equities	%
International Fixed Income	%
Listed Property	%
Cash	%
Total	**1 0 0** %

Note: you may not invest more than 85% in any single investment pool, except for Cash.

3. Applicant declaration

I direct the Trustee of FuturePlus Super to invest all of my superannuation benefits held in FuturePlus Super and ongoing contributions in the stated investment program.

a) I acknowledge that further information is available on request from the Trustee and in the current FuturePlus Super Product Disclosure Statement.

b) I understand that the investment choice will be made in accordance with the Trust Deed governing the Fund.

c) I understand that it is my responsibility to seek any necessary professional investment advice concerning my investment request.

d) I acknowledge that the Trustee will not be liable for any loss arising from my chosen investment strategy.

Signature Date / /

DO NOT FAX THIS FORM AS YOUR ORIGINAL AUTHORISATION IS REQUIRED

Where to send this form/enquiries

FuturePlus Super
PO Box N835
Grosvenor Place NSW 1220
website: www.futureplussuper.com.au

Phone: 1800 067 059
(8.30 am – 5.00 pm Mon – Fri)

enquiries: info@futureplussuper.com.au

FP07-000000M-2004

IMPORTANT NOTES

You should read the Product Disclosure Statement (PDS) before completing this form. The PDS is available from Member Services and the Fund's website.

MANAGED PORTFOLIO PROGRAM

The Fund offers you a choice of five investment strategies managed by professional investment managers. The strategies have been designed to suit members at different stages of their careers. Each strategy offers a different potential rate of return and degree of volatility and has strict guidelines that the investment managers are required to follow. You can select only one of these strategies at any given time.

The investment strategies available are:

- High Growth
- Diversified
- Balanced
- Capital Guarded
- Cash

You may change your initial investment portfolio at any time, by switching between investment strategies.

MEMBER CHOICE PROGRAM

If you prefer a higher degree of personal control over the investment of your superannuation benefits you may wish to take advantage of the Member Choice Program.

This allows you to invest directly in the six individual investment pools and create a tailor-made mix of investments across them. The investment pools are:

- Australian Equities
- International Equities
- Listed Property
- Australian Fixed Income
- International Fixed Income
- Cash

You may change your mix of investments at any time.

DEFAULT INVESTMENT PROGRAM

Personal Members who have not chosen a specific investment strategy will be deemed to have chosen the Cash Strategy of the Managed Portfolio Program.

For Employer Members, the Trustee will have determined a default investment program for your sub-plan, in consultation with your employer. This strategy will be set in your sub-plan rules. If you do not choose a specific investment program, this default investment program will apply to you until you do so.

Full details are contained in the Product Disclosure Statement.

MEMBER PROTECTED ACCOUNTS

If your account balance is less than $1,000 and you otherwise meet the member protection requirements, the Trustee must ensure that any fees and charges (insurance and taxes excluded) deducted from your account do not exceed the investment return on your account in any financial year (except where investment returns are poor or negative).

INVESTMENT RETURNS ARE NOT GUARANTEED

Neither the Trustee, Chifley, nor any investment manager, administrator or other service providers or any of their associated companies, guarantee the performance of the Fund or any of its investments, the repayment of capital, or any particular rate of return.

PROTECTING YOUR PRIVACY

Some of the personal information you are requested to provide is required to establish and maintain your membership in the FuturePlus Super Fund while other information is required under Australian Government Anti-Money Laundering and Counter-Terrorism Financing measures.

The Trustee is fully committed to comply with the National Privacy Principles in the way in which your personal information is stored and used. The policies adopted by the Trustee in order to comply with these principles are set out in a Privacy Policies document available on request from Member Services or on the Fund's website at www.futureplussuper.com.au

TRUSTEE INFORMATION

Please note that the information contained in this document is of a general nature only and is not for personal advice and has not taken into account your personal objectives, financial situation or needs. Any advice in this document is provided by Chifley Financial Services Limited (ABN 75 053 704 706), as an Australian Financial Services Licensee (AFSL 231148). Chifley Financial Services Limited is an APRA Registrable Superannuation Entity Licensee (RSEL: L0001120) and the trustee of FuturePlus Super (ABN 76 829 356 693). FuturePlus Super is a Registered Superannuation Entity (RSE: R1004366). Chifley Financial Services Limited is co-owned by the Local Government Superannuation Scheme, the Energy Industries Superannuation Scheme and Unions NSW.

Members should not rely solely on this information and should consider their own personal objectives, financial situation and needs before acting on this information. Prior to making any decision you should obtain and consider the relevant Product Disclosure Statement (PDS) pertaining to your membership.