



# FuturePlus Super

## 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	<input type="text"/>	Date of birth (dd/mm/yyyy)	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>
Title	<input type="text"/> (e.g. Mr/Mrs/Ms/Miss/Dr)						
Family name	<input type="text"/>						
Given name(s)	<input type="text"/>						
<b>Contact Details (postal address, telephone, email)</b>							
No./Street/PO Box	<input type="text"/>						
Suburb/Town/City	<input type="text"/>						
State/Territory	<input type="text"/>	Postcode	<input type="text"/>	Country (if outside Australia)	<input type="text"/>		
Phone: Home no. (inc. STD/ISD)	<input type="text"/>			Business no. (inc. STD/ISD)	<input type="text"/>		
Mobile no.	<input type="text"/>			Fax no. (inc. STD/ISD)	<input type="text"/>		
E-mail address	<input type="text"/>						
<b>Residential Address</b>							
<input type="checkbox"/>	<b>Same as Postal Address above</b>						
<input type="checkbox"/>	<b>Different from Postal Address above – you MUST complete below</b>						
No./Street	<input type="text"/>						
Suburb/Town/City	<input type="text"/>						
State/Territory	<input type="text"/>	Postcode	<input type="text"/>	Country (if outside Australia)	<input type="text"/>		



## 2. Changing Investment Program

PLEASE COMPLETE ONE OPTION ONLY

**Option 1 – LifeCycle Objective Management Program**

My anticipated retirement age is  (If you do not specify a retirement age, it will be assumed to be age 65)

My date of birth (dd/mm/yyyy) is  /  /

(If you select Option 1 but do not include your date of birth, your benefits and contributions will be invested in the Balanced Strategy of the Managed Portfolio Program)

**Option 2 – Managed Portfolio Program** (Select only one strategy)

- |   |   |
|---|---|
| <input type="checkbox"/> High Growth Strategy | <input type="checkbox"/> Capital Guarded Strategy |
| <input type="checkbox"/> Diversified Strategy | <input type="checkbox"/> Cash Strategy            |
| <input type="checkbox"/> Balanced Strategy    |   |

**Option 3 – Member Choice Program**

Insert % of benefits and ongoing contributions you choose to invest in the six investment pools totalling 100%

Australian Equities	<input type="text"/> %	Australian Fixed Income	<input type="text"/> %
International Equities	<input type="text"/> %	International Fixed Income	<input type="text"/> %
Listed Property	<input type="text"/> %	Cash	<input type="text"/> %
<b>Note:</b> you may not invest more than 85% in any single investment pool, except for Cash.		<b>Total</b>	<input type="text"/> %

1 0 0 %

## 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.

- I acknowledge that further information is available on request from the Trustee and in the current FuturePlus Super Product Disclosure Statement.
- I understand that the investment choice will be made in accordance with the Trust Deed governing the Fund.
- I understand that it is my responsibility to seek any necessary professional investment advice concerning my investment request.
- I acknowledge that the Trustee will not be liable for any loss arising from my chosen investment strategy.

Signature

Date

 /  / 

**DO NOT FAX OR EMAIL THIS FORM AS YOUR ORIGINAL AUTHORISATION IS REQUIRED**

### IMPORTANT NOTES

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

#### LIFECYCLE OBJECTIVE MANAGEMENT PROGRAM

By choosing the LifeCycle Objective Management Program your contributions will be invested so that the mix of your investments is adjusted automatically according to your changing needs as you move towards retirement. This means that when you are younger you will have more "capital growth" investments such as shares. As you near retirement, the bulk of your money will progressively be invested in cash and fixed interest investments, such as government bonds, which usually offer steadier, less variable returns and higher income. At any time during your working life, you have the comfort and security of knowing that your investment program is automatically keeping pace with your changing needs. All you have to do is tell us your date of birth and the age at which you expect to retire. Unless you nominate another age (which cannot be less than 55), your retirement age is assumed to be 65. If you do not tell us your date of birth, your contributions will be invested as if you turned 40 on the last 30 June prior to receipt of your first application. Your superannuation contributions will be invested across six of the fund's underlying investment pools. See the Product Disclosure Statement (PDS) for more information.

#### 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.

## 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).

## DEFAULT INVESTMENT PROGRAM

Personal Members who have not chosen a specific investment strategy will be deemed to have chosen the Balanced 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.

## EFFECTIVE DATE OF INVESTMENT ELECTION

If you are a new member, the effective date of your investment strategy election will be the first Business Day the Fund receives both this form (completed properly and signed) and your funds.

If you are an existing member, the effective date of your investment strategy election will be the date the Fund receives this form (completed properly and signed) or if you have nominated a date, the effective date will be your nominated date provided it is a Business Day after the Fund receives this form. If your nominated date is not a Business Day, the effective date will be the Business Day immediately following your nominated date. Once a form is received by the Fund it cannot be withdrawn. A new form must be completed and the effective date will be the day the new form is received by the Fund.

If you have sent in multiple 'Selecting or Changing Investment Program' forms which are received on the same day:

- a) The election received first will be processed effective the day of receipt with later elections being processed effective the next Business Day (then each following day per additional form as required).
- b) Where the order of receipt cannot be identified, the order of processing will be at the Trustee's discretion – although typically will be processed in order of the date on the forms.

A Business Day is any day that the Australian Stock Exchange [ie both SEATS (Stock Exchange Automated Trading System) and DTF (Derivatives Trading Facility)] is open for trading in Australia.

## 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 FuturePlus Super while other information is required under Australia's Anti-Money Laundering and Counter-Terrorism Financing laws.

The Trustee is fully committed to comply with the National Privacy Principles in the way in which your personal information is stored and used. Full details of how this is achieved are contained in the Trustee's Privacy Policy, which is available from Member Services or the website at [www.futureplussuper.com.au](http://www.futureplussuper.com.au).

## TRUSTEE INFORMATION

Please note that the information contained in this document is of a general nature only and does not constitute personal advice as it does not take 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 and the trustee of FuturePlus Super (ABN 76 829 356 693). Chifley Financial Services Limited is co-owned by Energy Industries Superannuation Scheme Pty Limited (ABN 72 077 947 285), Unions NSW, Australian Workers Union (ABN 28 853 022 982 trading as the Australian Workers Union National Office) and the Australian Workers Union (ABN 70 662 384 762 trading as The Australian Workers Union Greater New South Wales Branch).

You should not rely solely on this information and you should consider your own personal objectives, financial situation and needs before acting on this information. Prior to making any investment decision you should obtain and consider the relevant Product Disclosure Statement (PDS) or other offer document and seek professional investment advice.

## Where to send this form/enquiries

FuturePlus Super  
PO Box N835  
Grosvenor Place NSW 1220  
website: [www.futureplussuper.com.au](http://www.futureplussuper.com.au)

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

enquiries: [info@futureplussuper.com.au](mailto:info@futureplussuper.com.au)

