

Investment Options Change for Income Stream members

Who should use this form?

This form should be completed if you are a Working Income Stream or a Retirement Income Stream member and you would like to change your investment choice for your Income Stream account; and/or the order in which your investment option balances are reduced when you receive income stream payments. This change will only apply to your Income Stream account(s). If you want to change your investment choice for an Accumulation Plan account or Beneficiary Account, you need to complete the relevant *Investment Options Change (E149)* form for that account. For further information visit esssuper.com.au or call the Member Service Centre.

Before you start

If you have more than one Income Stream account, the choice(s) you make on this form will apply to all of your accounts, unless otherwise specified. If you want to make a different choice for each account, you must complete a separate form for each account. If you are changing your investment choice for your existing account balance (*SECTION 2*), your completed form must be received by ESSSuper by close of business on the 20th day of the month to take effect from the first day of the next month (e.g. if received by 20 June, the effective date will be 1 July). If the 20th day of the month is not a business day, your completed form must be received by close of business on the last business day prior to the 20th. Any change to your **income stream payment order** (*SECTION 3*) will take effect from the first income payment after ESSSuper processes your completed form.

If you have a Member's Online Account, confirmation of your investment option selection can be found in your transaction history and once the selection takes effect it can be viewed on your investment summary page.

Please complete this form in pen using CAPITAL letters and mark with an [X] where applicable.

Section 1 Member details

Member number	<input type="text"/>
Title	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Other (please specify) <input type="text"/>
Surname	<input type="text"/>
Given names	<input type="text"/>
Date of birth	<input type="text"/> / <input type="text"/> / <input type="text"/>
Postal address	<input type="text"/>
Suburb	<input type="text"/>
State	<input type="text"/> Postcode <input type="text"/>
	<input type="checkbox"/> Mark with an [X] if your postal and residential address are the same. If your residential address is different, please specify below.
Residential address	<input type="text"/>
Suburb	<input type="text"/>
State	<input type="text"/> Postcode <input type="text"/>

Section 1

Member details cont.

Telephone (business hours) () (after hours) () Telephone (mobile) Email address 

By providing your email address you are authorising ESSSuper to send communications to that address. This authorisation will apply until it is revoked by you.

Section 2

Investment choice for existing account balance

Only complete this section if you would like to change the way your **existing balance** is invested.I would like to invest my **existing account balance** as follows:**Standard Options**Shares Only %High Growth %Growth (default) %Balanced %Conservative %Defensive %Cash %**Alternative Options**Basic Growth %Ethically Minded %**Total** (must equal 100%) %

Section 3

Payment order for income stream payments

Only complete this section if you would like to change the order in which investment option balances are reduced when income stream payments are made.

If you don't complete this section your income payments will continue to be paid based on your most recent election. If you have not made an election the default order will apply.

I would like my **investment option balances to be reduced**: *(Please choose only one)* **OPTION 1**: Using the default order (*Cash, Defensive, Conservative, Balanced, Growth, Basic Growth, Ethically Minded, High Growth and Shares Only*).

OR

 OPTION 2: Proportionately based on the amounts currently invested in each investment option

OR

Section 3

Payment order for income stream payments cont.

OPTION 3: In the order I have specified below: *(please number ALL boxes below from 1 to 9 (e.g. 1), with 1 being the first option from which income payments are made. Note: the default order will be applied to any investment options that are not numbered).*

Standard Options

 Shares Only High Growth Growth Balanced Conservative Defensive Cash

Alternative Options

 Basic Growth Ethically Minded

Section 4

Declaration and signature

I acknowledge and agree that:

- I have read and understood the information regarding my investment options contained in the *Income Streams Product Disclosure Statement* available from ESSSuper and have considered obtaining independent financial advice in respect of my superannuation options. The information provided by ESSSuper is of a general nature and does not constitute personal financial advice.
- I understand and accept the investment risks and returns of the investment choice I have made. My benefits are not guaranteed or underwritten by the Victorian Government or ESSSuper and ESSSuper does not come under the jurisdiction of the Australian Financial Complaints Authority (AFCA).
- I understand that the investment choice I have made on this form will apply until I make a new investment choice.
- I have read and accept the statements relating to privacy (and in particular to the collection, use and disclosure of personal information by ESSSuper) which appear in the privacy policy available from ESSSuper.
- I fully understand the implications of the election I have made on this form and the information provided on this application is true and correct.

Signature

PLEASE SIGN HERE

Date

 / /

Please forward this completed form to

ESSSuper GPO Box 1974, Melbourne Vic 3001

T 1300 650 161 | esssuper.com.au

At ESSSuper, we treat the privacy and confidentiality of our members' personal information seriously. We are committed to complying with the guidelines of the *Privacy and Data Protection Act 2014* and the *Health Records Act 2001 (Vic)*. To obtain a copy of ESSSuper's privacy policy go to our website at esssuper.com.au