

# Investment Choice Form Accumulation account



Use this form to change how your superannuation account is invested.

How you invest your retirement savings is an important decision. Before making a choice, please read the First Super PDS and the Target Market Determination (TMD) for the Fund's Accumulation Product, available at [firstsuper.com.au/pds](https://firstsuper.com.au/pds), and consider obtaining financial advice. Our Advice team offers personal advice on investment choice as part of your membership fees. Call **1300 360 988** or visit [firstsuper.com.au/book](https://firstsuper.com.au/book) to make a appointment.

You can choose to switch investment options at any time, provided your account balance is at least \$1,000. Two switches each financial year are available at no additional cost. Each additional switch costs \$30.00.

Switches are processed weekly and become effective from the date on which the switch was processed. However, the Trustee reserves the right to adjust the timing of switches where it considers necessary for good management of the Fund.

**Please complete this form in BLOCK LETTERS using a blue or black pen.**

## Section 1 | Your personal details

If you have more than one First Super account, please use a separate form for each account.

Title	Member number	Account number (if known)	Date of birth (DD/MM/YYYY)	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Surname				
<input type="text"/>				
Given name(s)				
<input type="text"/>				
Residential address				
<input type="text"/>				
Town/Suburb/City			State	Postcode
<input type="text"/>			<input type="text"/>	<input type="text"/>
Postal address (if different from above)				
<input type="text"/>				
Town/Suburb/City			State	Postcode
<input type="text"/>			<input type="text"/>	<input type="text"/>
Telephone (home)	Telephone (work)		Mobile number	
<input type="text"/>	<input type="text"/>		<input type="text"/>	
Email				
<input type="text"/>				

## Section 2 | Your investment choice

You can invest in one or a combination of five investment options. Please use whole numbers and make sure your choice equals 100%. If your choice does not equal 100%, the difference may be adjusted through the Balanced option.

- > To change how your existing super balance AND future contributions are invested, complete columns A and B.
- > To change how your existing super balance is invested, complete column A. This means your future contributions will remain invested in your current investment choice.
- > To change how your future contributions are invested, complete column B. This means your existing super balance will remain invested in your current investment choice.

Investment option	A. Invest my existing super balance in:	B. Invest any future contributions paid into my account in:	Example only
Shares Plus			-
Growth			10 %
Balanced (MySuper)			40 %
Conservative Balanced			50 %
Cash			-
TOTAL	100 %	100 %	100 %

## Section 3 | Declaration

By signing this form, I request that First Super changes my investment choice for my existing account balance and/or future contributions.

- > I acknowledge that I have obtained and read the information about investments in the First Super PDS and the Fund's Accumulation Product TMD available by calling First Super on **1300 360 988** or visiting **firstsuper.com.au/pds**.
- > I understand the effect of, and any risk involved in, switching my investment option(s) and agree that First Super has no liability for my choice.
- > I understand that past performance is not a guarantee of future performance and have considered whether I need specific financial advice before making an investment decision.
- > I acknowledge that the Trustee (First Super) may maintain one or more reserves in the course of operating the Fund and that conditions including fees, switching costs and the timing of switching (including possible suspension during volatile periods) are subject to variation from time to time at First Super's discretion.

I confirm that I am authorised to provide the personal details presented in this form and I consent to my information being checked with First Super or the official record holder via third-party systems for the purpose of confirming my identity.

Please sign here

Date (DD/MM/YYYY)

This form must be received within 30 days of the date you sign it or it will not be valid.

### Please return this completed form by:

 First Super, PO Box 666, Carlton South, VIC 3053


 mail@firstsuper.com.au

If your form is returned to us unsigned or incomplete, your request will not be processed.

### Want to know more? We're here to help.

 1300 360 988

 mail@firstsuper.com.au

 Download the First Super app to manage your account

 firstsuper.com.au



The advice provided in the First Super PDS is general in nature, and you should seek advice in relation to your personal situation. The First Super Advice team can provide you with personal advice about investment choice suited to your circumstances. Call **1300 360 988** or visit **firstsuper.com.au/book** to make an appointment.

First Super Pty Ltd ABN 42 053 498 472, AFSL No. 223988. August 2024.