

# Member Investment Choice - Personal Division



## Do you know you can manage your investment choice online?

It's as easy as logging in to your account via **MemberAccess** at [clubplussuper.com.au/memberaccess](http://clubplussuper.com.au/memberaccess) to advise your new investment choice.

If using this form, please complete in black ink with BLOCK letters. This request will be invalid if not signed and dated. Please return this completed form to: **Club Plus Super, Locked Bag 5007, Parramatta NSW 2124.**



### Remember

1. If you are an existing Club Plus Super member you can elect to invest your current account balance in different investment options to your future transactions.
2. If you are a new Club Plus Super member you can only elect to invest your future transactions in the investment option(s) of your choice. You can elect to invest your current account balance in different investment options after you have a positive account balance.
3. For your investment switch to become effective, your completed Member investment choice form must be received by 4:00pm on any business day to take effect two business days after receipt.
4. You can switch between investment options without incurring switching fees, but a buy-sell spread applies - see 'Fees and Costs' in the *Investment Booklet* for the current buy-sell spreads for each option.
5. Please make sure you read the investment choice information in the *Personal Division Product Disclosure Statement (PDS)* and *Investment Booklet* and seek financial advice if necessary.

## Section 1: Personal details

Member number:

Title: Mr/Mrs/Ms/Miss/Other

Date of birth (DD/MM/YYYY):

 /  / 

Surname:

Given name(s):

Address:

Suburb

State

Postcode

Phone number:

Mobile number:

Email:

## Section 2: Investment choice option

- Where you choose to invest in an option:
- The total must add up to 100%.
- The amounts must be whole percentages, eg 27%, 15% etc.
- Complete either 'Existing balance' or 'Future transactions' or both.

### Existing balance

I would like my existing balance to be invested in the following investment option(s):

Cash	<input type="text"/>	%
Conservative Balanced	<input type="text"/>	%
Balanced	<input type="text"/>	%
Growth	<input type="text"/>	%
High Growth	<input type="text"/>	%
Australian Shares	<input type="text"/>	%
International Shares	<input type="text"/>	%
<b>Total</b>	<input type="text"/>	<b>100 %</b>

### Future transactions

I would like to select the following investment option(s) for all future transactions:

Cash	<input type="text"/>	%
Conservative Balanced	<input type="text"/>	%
Balanced	<input type="text"/>	%
Growth	<input type="text"/>	%
High Growth	<input type="text"/>	%
Australian Shares	<input type="text"/>	%
International Shares	<input type="text"/>	%
<b>Total</b>	<input type="text"/>	<b>100 %</b>

**Note:** When you join Club Plus Super, you must specify one or more of the above mentioned investment options for your future transactions.

# Member Investment Choice - Personal Division (cont.)

## Section 3: Privacy

The personal information provided on this form is collected by and held for Club Plus Super by the fund administrator Australian Administration Services (AAS) in accordance with the Australian Privacy Principles of the *Privacy Act 1988 (Cth)*, for the purpose of administering accounts and providing services associated with your membership of the Fund.

You should read the *Privacy Policy* at [clubplussuper.com.au/privacy-policy](http://clubplussuper.com.au/privacy-policy) before completing the form. Call us on **1800 680 627** for a hard copy of the Policy. The Policy contains information about how personal information is collected, used and disclosed, how you can correct your personal information, make a complaint about a privacy breach and other important information about safeguards in place to protect your personal information.

By providing your information, you acknowledge that you have read and understood the *Privacy Policy*.

## Section 4: Investment choice agreement

- I understand that my current Club Plus Super member account balance and all future contributions will be invested in the investment options selected in Section 2.
- I also understand that if my investment choice options do not add up to 100%, this form will be invalid.
- I have read the Club Plus Super member investment choice information in the *Personal Division PDS* and *Investment Booklet* and acknowledge that I should seek independent professional financial advice if I need assistance in making a choice.

Member's signature

Date (DD/MM/YY)

## Contact us

member hotline: 1800 680 627  
email: [member@clubplussuper.com.au](mailto:member@clubplussuper.com.au)  
website: [clubplussuper.com.au](http://clubplussuper.com.au)

Club Plus Superannuation Pty Limited ABN 26 003 217 990, AFSL No. 245362  
RSE Licence No. L0000529 as trustee of Club Plus Superannuation Scheme  
ABN 95 275 115 088, RSE Registration No. R100075

CJ/PER/MIC 1016.9 09/20 ISS5