

Change your Optimiser investment options

OP12 - Pension Account



right by your side

You can switch investment options quickly and easily using Member online. Simply log in and click Investments – Change investments.

Alternatively, please complete and email this form back if you want to:

- Change your existing balance to a different investment option(s) for your Optimiser Pension account.
- Change the investment allocation for your Pension payments.
- Initiate, change or cancel auto-rebalancing for your investment strategy.

Personal Details Brighter Super respects your privacy. All personal information collected is protected in line with Brighter Super's Privacy policy.

Member number	Account number	Given name(s)	
Surname			Date of birth / /
Email		Phone number	
Residential address			
Suburb/town		State	Postcode
Postal address (if different to above)		State	Postcode

Important information

1. Pension payment options

If you select an investment option(s) for pension payments on this form, your selection only applies to regular pension payments and not any lump sum withdrawals you make. You can choose which option(s) you would like your lump sum withdrawals to be taken from when you request the withdrawal.

2. Effective switch date

If your valid request is received before 3pm (AEST) on a business day it will take effect on the same business day. Any requests received after 3pm (AEST) will take effect on the following business day. Your investment switch will, in most cases, be reflected on your account within 2 working days after we receive your application.

A business day is defined as a day between Monday and Friday which is not an Australian national public holiday. Only one investment switch will be accepted for an account on any given day. See the *Optimiser Pension Investment choice guide* for more details.

3. Privacy and personal information

Brighter Super respects your privacy. All personal information collected on this form is protected in line with *Brighter Super's Privacy Policy*. To find out more about how we collect and manage your personal information, please refer to our *Privacy Policy* available from our website brightersuper.com.au.

1 What would you like to do?

Please tick (✓) the box and indicate your choice(s) below.

- I would like to change my **Pension account balance** (section 2).
- I would like to change where my **future pension payments are drawn from** (section 3).
- I would like to elect to have my investments auto re-balanced each year (section 4).
- I would like to cancel or change my previous election to auto re-balance my investments each year (section 4).

If you hold more than one account please specify below which account(s) you would like the changes to apply to.

Account number(s): _____

2 Transfer my existing balance

Please complete this section if you are wanting to change the investment strategy for your existing Optimiser Pension account balance.

Use whole percentages and values only. Percentages must total 100%.

Ready-made options	Percentage
Multi-Manager Conservative Fund	%
Multi-Manager Balanced Fund	%
Multi-Manager Growth Fund	%
Multi-Manager High Growth Fund	%
Single asset class options	
Cash Fund	%
First Sentier Wholesale Global Credit Income Fund	%
Australian Listed Property Index Fund	%
Global Property Fund	%
Hyperion Australian Growth Companies Fund	%
Australian Shares Fund	%
Australian Shares Multi-Manager Fund	%
Australian Shares Value Fund	%
International Shares Fund	%
International Shares Multi-Manager Fund	%
Australian Fixed Interest Fund	%
Vanguard International Fixed Interest Indexed Fund (Hedged)	%
Vanguard Australian Fixed Interest Indexed Fund	%
Ironbark Paladin Property Securities Fund	%
Walter Scott Global Equity Fund	%
Optimiser Closed options ¹	
Asteron Traditional Capital Guaranteed Fund	%
Ausbil Australian Emerging Leaders	%
Pendal Imputation	%
TOTAL	100%

¹ These investment options are only available to members that were invested in the option(s) prior to the closure date for the relevant option and are currently still invested in these options.

3 Change my pension payment option(s)

If you have changed your investment option(s) for your existing account balance in section 1, and do not make a selection below your pension payment will be withdrawn in the same proportions that make up your overall account balance at the time of payment. If you do not wish for this to happen, please make your new selection below.

I wish to change my pension payment option(s) as follows:

- Take payments across my investment options in the same proportions that make up my overall account balance at the time of payment.
- Take payments from options specified:
- Complete **Option 1** to nominate a percentage — use whole percentages only. Percentages must total 100%.
- OR**
- Complete **Option 2** to indicate withdrawal preference. The balance of each option will be exhausted before withdrawing from the next option. To confirm the withdrawal order please number your chosen option(s) 1, 2, 3 etc

Ready-made options	Option 1	Option 2
Multi-Manager Conservative Fund	%	
Multi-Manager Balanced Fund	%	
Multi-Manager Growth Fund	%	
Multi-Manager High Growth Fund	%	
Single asset class options		
Cash Fund	%	
First Sentier Wholesale Global Credit Income Fund	%	
Australian Listed Property Index Fund	%	
Global Property Fund	%	
Hyperion Australian Growth Companies Fund	%	
Australian Shares Fund	%	
Australian Shares Multi-Manager Fund	%	
Australian Shares Value Fund	%	
International Shares Fund	%	
International Shares Multi-Manager Fund	%	
Australian Fixed Interest Fund	%	
Vanguard International Fixed Interest Indexed Fund (Hedged)	%	
Vanguard Australian Fixed Interest Indexed Fund	%	
Ironbark Paladin Property Securities Fund	%	
Walter Scott Global Equity Fund	%	
Optimiser Closed options ²		
Asteron Traditional Capital Guaranteed Fund	%	
Ausbil Australian Emerging Leaders	%	
Pendal Imputation	%	
TOTAL	100%	

² These investment options are only available to members that were invested in the option(s) prior to the closure date for the relevant option and are currently still invested in these options.

4 Auto-rebalance your investment strategy

Please tick (✓) the applicable box below if you wish to have your investments automatically re-balanced.

- I wish to have my investments automatically re-balanced each quarter.
- I wish to have my investments automatically re-balanced half yearly.
- I wish to have my investments automatically re-balanced annually.
- I wish to cancel my previous election to automatically re-balance my investment strategy.

If you have elected to automatically re-balance your investments, we will re-balance your investments by switching them back into the percentage options you last chose. You can opt out of this choice at any time. Please refer to the *Optimiser Pension Investment choice guide*.

5 Member declaration

Please tick (✓) the boxes to confirm you have read and understood the information relating to your investment switch.

- I understand if I complete this form and only have an Accumulation account my request will be invalid and I will need to complete the relevant form for my Accumulation account(s).
- I understand my switch will take effect on the same business day after submitting a valid request, provided this is received on a business day before 3pm (AEST).
- I understand that if this form is incomplete the Fund will not be able to process my request.
- I understand that the unit price to value my investment switch has not yet been calculated, as outlined in the *Optimiser Pension Investment choice guide* and will be dependant on the date my request is considered received.
- I am aware there are rules about cancelling my request.
- I am aware that if required, I can contact Brighter Super for more information before completing this form.

Signature

Date signed

/ /

Please sign in blue or black pen - Brighter Super does not accept digital signatures on this form.

6 Power of Attorney signature

Complete this section if you are signing this form on behalf of the member in your capacity as the member's attorney.

By signing this form you are declaring that:

- you are nominated as an attorney on the member's Power of Attorney document and are authorised to act on the member's behalf for financial matters; and
- to the best of your knowledge and belief your appointment under the Power of Attorney document has not been revoked or otherwise withdrawn.

If more than one attorney has been appointed all attorneys will need to print their name, sign and date the form unless authorised to act severally.

Attorney 1	Signature	Date signed / /
Attorney 2	Signature	Date signed / /
Attorney 3	Signature	Date signed / /
Attorney 4	Signature	Date signed / /

Please sign in blue or black pen - Brighter Super does not accept digital signatures on this form.

Please (✓) one of the options below:

- I have attached valid Power of Attorney documentation³.
- I have previously supplied a valid Power of Attorney document to Brighter Super.

³ For a Power of Attorney (PoA) to be accepted, we require the forms to be posted through to us at GPO Box 264, Brisbane QLD 4001. Please ensure your documents have been certified on each page, and you have included certified ID for the attorney(s) nominated in the PoA, see our Proof of identity requirements information at brightersuper.com.au for more details.

Now you have completed this form and signed the declaration, please send it to us by:

Preferred Method

Website (Secure file upload)
brightersuper.com.au/contact-us

Alternative Options

Email (scanned copy)
membership@brightersuper.com.au

Post Brighter Super
GPO Box 264
Brisbane Qld 4001

