

Investment Choice Form

This form can be used by super and pension members.



Use this form if you want to:

- > Change your existing or future investments
- > Change your existing or future contributions
- > Change how you withdraw your pension income payments.

Choosing how to invest your superannuation is an important decision. To ensure you understand the implications of your choice and any associated risks, we recommend reading the First Super Product Disclosure Statement (PDS) or Pension PDS before making any decisions. These documents are available at firstsuper.com.au/pds.

There is no charge for the first two switches you make each financial year. After that, a \$30 switching fee is deducted from your account any time you change your investments. Go to firstsuper.com.au/fees for more information.

Investment switches are generally processed each Friday or the next working day if it falls on a public holiday. Your completed form must be received by First Super no later than 5pm (AEST) the day prior.

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

Section 1 – Your personal details

Account type First Super Accumulation Account OR First Super Allocated Pension Account
(Only tick one)

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)

Surname

Given name(s)

Residential address

Town/Suburb/City State Postcode

Postal address (if different from above)

Town/Suburb/City State Postcode

Telephone (home) Telephone (work) Mobile number

Email

Section 2 – Your investment choice (super)

This section is for super members only.

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 is invested, complete column A.
- > To change how your future contributions are invested, complete column B.
- > To change how your existing super balance AND future contributions are invested, complete columns A and B.

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

Section 3 – Your investment choice (pension)

This section is for pension members only.

To change how your existing account balance is invested, complete the 'Your investment choice' column below.

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.

Investment option	Your investment choice	Example only
Shares Plus		-
Growth		10 %
Balanced (default)		40 %
Conservative Balanced		50 %
Cash		-
TOTAL	100 %	100 %

Section 4 – Choose how your pension is drawn down (pension)

This section is for pension members only.

To tell us how you would like your income payments drawn from your account, select one option below.

If you are happy for your pension payments to be withdrawn proportionally across your investment options, go straight to section 5.

To specify the percentage of your pension payments you want drawn from each of the options you're invested in, complete column A below. Make sure the total equals 100%.

OR

To draw down your pension payments sequentially, complete column B below by numbering each investment option you hold in the order you want to draw payments. In the example below, payments would be withdrawn from the Balanced option first until all funds from this investment option have been withdrawn, then from the Growth option, then from Cash.

Investment option	A. Draw down payments by percentage:	Example only	B. Draw down payments sequentially:	Example only
Shares Plus		-		-
Growth		30 %		2
Balanced (default)		40 %		1
Conservative Balanced		30 %		-
Cash		-		3
TOTAL	100 %	100 %		

Section 5 – Declaration

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

- > I acknowledge that I have obtained and read the information about investments in the First Super PDS (super members) or Pension PDS (pension members) 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.

Return this form to us

Once you have completed and signed this form, send it to:

Mail First Super
PO Box 666
Carlton South, VIC 3053

OR

Email forms@firstsuper.com.au

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

We're here to help.

Want to know more?

Call 1300 360 988
Email mail@firstsuper.com.au
Website firstsuper.com.au

The advice provided in the First Super PDS and Pension PDS is general in nature, and you should seek advice in relation to your personal situation. First Super can provide you with limited advice about the investment options that may suit you best, or we can arrange for you to speak with one of our Financial Planners. Contact us to learn more.

First Super Pty Ltd ABN 42 053 498 472, AFSL No. 223988. December 2021.