

Change a Member's Investments (Financial Adviser)



Super SA



Triple S / Flexible Rollover Product / Income Stream

Please complete all the details on this form in **BLOCK LETTERS** using a **BLACK PEN** and return to Super SA via post or email.

3. Select client's scheme

Please change the following schemes investment option/s:

⚠ Use separate forms for each scheme you are making changes.

Triple S
(complete section 4 and 5)

Flexible Rollover Product (FRP)
(complete section 4 and 5)

Income Stream
(complete section 4 and 6)

⚠ Please note: 'Stable' investment was previously named 'Conservative'.

4. Change current investments (All schemes)

Please change the current balance to be invested as follows:

⚠ Use whole percentages.

High Growth	<input type="text"/>	%	Moderate	<input type="text"/>	%	Cash	<input type="text"/>	%
Socially Responsible	<input type="text"/>	%	Stable	<input type="text"/>	%	TOTAL	= 100	%
Balanced	<input type="text"/>	%	Capital Defensive	<input type="text"/>	%			

5. Change future contributions investments (Triple S & FRP only)

Please change future contributions into selected scheme to be invested as follows:

⚠ Use whole percentages.

High Growth	<input type="text"/>	%	Moderate	<input type="text"/>	%	Cash	<input type="text"/>	%
Socially Responsible	<input type="text"/>	%	Stable	<input type="text"/>	%	TOTAL	= 100	%
Balanced	<input type="text"/>	%	Capital Defensive	<input type="text"/>	%			

6. Change the withdrawal order (Income Stream only)

Please change the draw down order for all future withdrawals as follows:

(number ALL the boxes 1 through 7, with 1 being the investment to be withdrawn first.)

Cash	<input type="text"/>	Moderate	<input type="text"/>	Socially Responsible	<input type="text"/>
Capital Defensive	<input type="text"/>	Balanced	<input type="text"/>	High Growth	<input type="text"/>
Stable	<input type="text"/>				

Change a Member's Investments (Financial Adviser)



Super SA



Triple S / Flexible Rollover Product / Income Stream

Please complete all the details on this form in **BLOCK LETTERS** using a **BLACK PEN** and return to Super SA via post or email.

7. Financial Adviser Authority

To allow the financial adviser listed in section 2 to receive information regarding this investment switch within my account, I request and consent to give my financial adviser access to my account information and understand that:

- once access is granted, my financial adviser and/or their staff will only be able to obtain information on my account relating to this switch.
- this authority is limited to the investment switch within this form
- my financial adviser is not able to make changes to my account.
- should I wish to allow my financial adviser access to receive information beyond this investment switch, I will complete a "Authority to release information to a third party" form

8. Member declaration

- I declare the information supplied on this form is true and correct.
- I acknowledge that I've read and understood the information in the relevant Investment Guide (available at supersa.sa.gov.au) and I understand that:
 - Investing in an investment option involves some risk and on occasion my account balance may decrease and accept responsibility for my selection.
 - Super SA doesn't guarantee my investment or any rate of return.
 - The unit price for the investment option(s) I have elected on this form may be more or less than was quoted at the time of making this election.
 - The unit price applied to a switch will represent the market value of an investment option calculated after the switch is received.
 - Past performance is not a reliable indicator of future performance.
 - A request to switch your account balance that is received before 5pm on a business day will generally take effect on the third business day following the date of receipt.
 - No additional investment switches can be processed online until the previous investment switch has been completed, for more information please contact Super SA.

Signature

Date / /

9. Financial Adviser Declaration

By signing the below, I confirm and declare that:

- The change to investment exposures, risks and fees has been explained to the above listed member.
- I have provided the member with the relevant investment guide.

Financial Adviser Name

Signature

Date / /

! Please note: Section 8 and 9 must be signed for this investment change to be processed by Super SA.

Contact us **EMAIL** supersa@sa.gov.au, or

POST GPO Box 48, Adelaide SA 5001

WEBSITE supersa.sa.gov.au

MEMBER CENTRE (by appointment only) 151 Pirie St, Adelaide, SA 5000

PHONE 1300 369 315