# Change a Member's Investments (Financial Adviser)





### 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.

To find out more visit supersa.sa.gov.au or call 1300 369 315								
This form is to allow Financial Advisers to change the investments held by a member.								
Client ID:								
1. Personal details	5	Date of birth	1 M 1 Y Y Y Y					
Given Name(s)								
Family Name								
Email address¹								
Mobile phone <sup>1</sup>	Work phone	Home phone						

'By providing your email address and/or telephone number(s) you are agreeing to receive, from Super SA, or an organisation on behalf of Super SA, marketing communications including newsletters, announcements, invitations or surveys. You may opt out of these marketing communications at any time by updating your communication preferences in our online member portal or by contacting Super SA. If you opt out of marketing communications, you will still receive important account information from us.

2. Financial Adviser details								
Financial Adviser Name								
Name of Business	Name of Business							
Adviser email								
Adviser contact number	AFSL number	ASIC Financial adviser representative number						



Postcode

Postcode

State

State

Street address

Postal address (if different from above)

Suburb

Suburb

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3. Select client's scheme Please change the following schemes investment option/s:  ① Use separate forms for each scheme you are making changes.								
Triple S (complete section 4 and 5)		xible Rollover Product (FRP) mplete section 4 and 5)		Income Stream (complete section 4 and 6)				
Please note: 'Stable' inves	tment was previo	ously named 'Conservative'.						
4. Change current investments (All schemes)  Please change the current balance to be invested as follows:  ① Use whole percentages.								
High Growth	%	Moderate	%	Cash	%			
Socially Responsible	%	Stable	%	TOTAL	= 100 %			
Balanced	%	Capital Defensive	%					
5. Change future contributions investments (Triple S & FRP only)  Please change future contributions into selected scheme to be invested as follows:  ① Use whole percentages.								
High Growth	%	Moderate	%	Cash	%			
Socially Responsible	%	Stable	%	TOTAL	= 100 %			
Balanced	%	Capital Defensive	%					
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 Moderate Socially Responsible  Capital Defensive Balanced High Growth								

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#### 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 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 quarantee my investment or any
  - 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	D /	M M /	

9. Financial Adviser Declaration  By signing the below, I confirm and declare that:								
· ·	to investment exposures, risks and fees has been explain led the member with the relevant investment guide.	ned to the above list	ed member.					
Financial Adviser Name								
Signature	×		Date D	D /		/		

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

(E) WEBSITE supersa.sa.gov.au

(🗓) **PHONE** 1300 369 315

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