

Change a Member's Investments (Financial Adviser)



Super SA



Triple S / Flexible Rollover Product / Income Stream / Super SA Select

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)

☐ Super SA Select
(complete section 4 and 5)

4. Change current investments (All schemes)

Please change the current balance to be invested as follows:

ⓘ Use whole percentages.

High Growth %

Balanced %

Socially Responsible %

Stable %

Cash %

Indexed High Growth %

Indexed Balanced %

Moderate %

Capital Defensive %

Total = 100 %

Low-cost Indexed Options

Please note: Indexed Balanced and Indexed High Growth are not available within FRP, Capital Defensive option is not available within Super SA Select.

5. Change future contributions investments (Triple S, FRP and Super SA Select only)

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

ⓘ Use whole percentages.

High Growth %

Balanced %

Socially Responsible %

Stable %

Cash %

Indexed High Growth %

Indexed Balanced %

Moderate %

Capital Defensive %

Total = 100 %

Low-cost Indexed Options

Please note: Indexed Balanced and Indexed High Growth are not available within FRP, Capital Defensive option is not available within Super SA Select.

6. Change the withdrawal order (Income Stream only)

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

Option 1: Nominated Order

Please nominate the order you would like your payments drawn from your account, by numbering the boxes 1 to 9 (with 1 being drawn first).

	Default order	Nominated order
Cash	1	<input type="text"/>
Capital Defensive	2	<input type="text"/>
Stable	3	<input type="text"/>
Moderate	4	<input type="text"/>
Indexed Balanced	5	<input type="text"/>
Socially Responsible	6	<input type="text"/>
Balanced	7	<input type="text"/>
Indexed High Growth	8	<input type="text"/>
High Growth	9	<input type="text"/>

Once there's no longer enough money in your chosen option(s), payments will be deducted proportionately from the balance invested in your other option(s).

Option 2: Nominated Percentage draw down

Please nominate the percentage you would like drawn from your investments for each payment. The percentages must add up to 100%. If no selection is made and you tick Option 2 but do not specify a choice in the table below, your payments will be drawn proportionally from all the investments in your account.

	Nominated draw down
Cash	<input type="text"/> %
Capital Defensive	<input type="text"/> %
Stable	<input type="text"/> %
Moderate	<input type="text"/> %
Indexed Balanced	<input type="text"/> %
Socially Responsible	<input type="text"/> %
Balanced	<input type="text"/> %
Indexed High Growth	<input type="text"/> %
High Growth	<input type="text"/> %

Option 3: Proportional (with payment of your income drawn in the same proportions as investments held in your account)

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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 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 as at the end of the business day on which the request to switch is processed.

The daily switching deadline is 5pm on a given business day. Switches received after the deadline on a business day, will be taken to have been received on the next business day.

A switch of your current super balance will generally be allocated to your new investment option(s) on the second business day following the date of processing.

Any switches not received via the member portal may take up to two business days to process with future deposits and future income payments taking effect at the time the switch is processed.

No additional investment switches can be requested or processed until the previous investment switch has been completed.

- Past performance is not a reliable indicator of future performance.
 - No additional investment switches can be processed until the previous investment switch has been completed, for more information please contact Super SA.
 - I understand that my personal information will be used by Super SA and/or its authorised service providers to assist with processing my request and will be handled as per Super SA's Privacy Policy.
- I confirm that I am authorised to provide the personal details presented and I consent to my information and/or identity documents being checked with the document issuers or official record holders via third party systems for the purpose of confirming my identity.

Signature

Date / /

9. Financial Adviser Declaration

By signing the below, I confirm and declare that:

- The change to investment exposures, risks and fees have 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



Website supersa.sa.gov.au



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