



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

# LUMP SUM INVESTMENT CHOICE

Use this form to choose or change your Lump Sum investment options.

## 1. Personal Details

**Super ID**

□ □ □ □ □ □ □ □ □ □

Mr  Ms  Miss  Mrs  Dr  Prof

Surname \_\_\_\_\_

Given name(s) \_\_\_\_\_

Residential address \_\_\_\_\_

Postcode \_\_\_\_\_

Postal address (if different from above) \_\_\_\_\_

Postcode \_\_\_\_\_

Date of birth        /        /

Email\* \_\_\_\_\_

Telephone\* (W) \_\_\_\_\_

(H) \_\_\_\_\_

(M) \_\_\_\_\_

Name of agency \_\_\_\_\_

Employee no \_\_\_\_\_

## 2. Investment Options

Please invest the balance of my Member Component and all future contributions in the following investment option (tick one box only). The Member Component is made up of your Member Account and Rollover Account (if any).

- |                                       |   |
|---------------------------------------|---|
| <input type="checkbox"/> High Growth  | <input type="checkbox"/> Socially Responsible |
| <input type="checkbox"/> Balanced     | <input type="checkbox"/> Moderate             |
| <input type="checkbox"/> Conservative | <input type="checkbox"/> Capital Defensive    |
| <input type="checkbox"/> Cash         |   |

If you do not select an investment option prior to 5pm, 25 January 2021, any funds in the Growth option will be switched to the Balanced option on 3 February 2021.

## 3. Switching Information

You can choose to change your investment option for your member component and all future member contributions. This is called an investment switch. The first switch in any financial year is free. Any further switches in the same financial year will cost \$20 for each switch.

If this is not your first switch this financial year, please make a Direct bank transfer (EFT) to cover the \$20 fee:

Please make your EFT payment to:  
 BSB: 065-266  
 Account Number: 10000477  
 Account Name: South Australian Superannuation Scheme  
 Reference Number: 005 (your Super ID)

eg if your Super ID is 71293658 the reference number you would use is 005 71293658.

Any change to your investment option(s) will not be reflected in any quotes performed through the secure member area of the Super SA website until Super SA has received and processed all contributions and other transactions relating to the period prior to the switch.

You should seek professional financial advice before switching options to assist you choose the investment option that best suits your needs.

**Contact us**

**By Appointment only:**

Ground floor, 151 Pirie Street  
 Adelaide SA 5000  
 (Enter from Pulteney Street)

**Postal**  
 GPO Box 48, Adelaide, SA 5001

**Call**  
 1300 369 315

**Email**  
 supersa@sa.gov.au

**Website**  
 www.supersa.sa.gov.au

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 contacting Super SA. If you opt out of marketing communications, you will still receive any important account information from us.



**Switching timeframes**

Investment switches are generally processed twice weekly as follows:

These times may be varied for operational reasons\*, such as public holidays. Prior to variations members will be notified via the Super SA website.

The unit price applied to a switch will represent the market value of an investment option calculated after the published deadline for the receipt of Investment Choice forms.

Form received by:	Unit price applied:
5pm Monday	Unit price effective the following Thursday
5pm Thursday	Unit price effective the following Tuesday

*\*Normal Thursday, 28 January 2021 (form received by) switch deadline (subject to Section 2 note) will be moved to Friday 29 January 2021, with price effective the following Wednesday.*

**4. Member Declaration**

I declare that the information I have provided on this form is true and correct and understand that:

- There is a possibility that the unit price for the investment option I have elected on this form may be more or less than was quoted at the time of making this election.
- I am responsible for the investment option(s) I have chosen and I am aware of the consequences of making such an election.
- I am aware that a fee of \$20 will be charged on second and subsequent switches in the financial year.<sup>1</sup>
- I have read the switching options above and the Investment Choice fact sheet and understand the terms and conditions of making an investment switch.

Signature \_\_\_\_\_ Date    /    /

<sup>1</sup> If this is not your first switch this financial year, please make payment via direct bank transfer (EFT). Please use "005 (your Super ID)" as the reference number on the transfer.